



City of Santa Fe, New Mexico

Memorandum



DATE: March 12, 2024

TO: Governing Body (May 8, 2024)
Finance Committee (May 6, 2024)
Quality of Life (May 1, 2024)

VIA: Maria Sanchez Tucker, Community Services Director *MT*
Manuel Sanchez, Division of Senior Services Director *MS*

FROM: Theresa Trujillo, Program Manager *TT*

ITEM AND ISSUE:

Request for the Approval of Fiscal Year 2024 State of New Mexico Aging and Long-Term Services Department Intergovernmental Agreement #24-624-4000-0024 Amendment No. 01 for a total decrease compensation Amount of (\$83,000.00) - (\$27,000.00) in the Foster Grandparent Program (FGP), (\$64,000.00) in the Senior Companion Program (SCP) and increasing \$8,000.00 in the Retired Senior Volunteer Program (RSVP), Term Ending June 30, 2024; Theresa Trujillo, Volunteer Program Manager ttrujillo@santafenm.gov, 505-955-4745.

BACKGROUND AND SUMMARY:

The Senior Services Department is requesting the approval of the State of New Mexico Aging and Long-Term Services Department Grant Agreement Amendment No. 01 for the Senior Volunteer Programs decreasing the Grant Agreement by (\$83,000.00). The amendment is for the Foster Grandparent (\$27,000.00), Senior Companion (\$64,000.00) and Retired Senior Volunteer Programs \$8,000.00. The attached Intergovernmental Agreement reflects the Fiscal Year 2024 decrease appropriations for all three volunteer Programs. The amended allocations are as follows; Foster Grandparent Program \$61,208.17, Senior Companion Program, \$102,304.83, and the Retired Senior Volunteer Program \$66,607.00.

Our Foster Grandparent program provides opportunities for our senior volunteers to assist children (with special or exceptional needs) in classrooms or Head starts. Then Senior Companion Program arranges for active seniors to visit and assist frail, homebound elderly clients in their homes, helping them avoid expensive institutionalization. Our Retired Senior Volunteer Program recruits and provides meaningful volunteer opportunities for senior volunteers to help others by sharing their experience, knowledge, and efforts. RSVP volunteers work in food distribution sites, soup kitchens, hospitals, libraries, senior centers, shelters, etc. The midyear budget adjustment is conducted by the ALTSD to reallocate funding to programs to ensure all programs within the state receive adequate funding. The reduction is a result of the program losing volunteers and not finding replacements for them. The Volunteer Program Staff is actively working on recruiting eligible volunteers for the program.

CONTRACT NUMBER:

The FY24 Munis contract number is 3204357

Project Ledger #'s- (FGP) COM2424101, (RSVP) COM2424104, (SCP) COM2424103

ACTION REQUESTED:

The Community Services Department respectfully requests your review and approval.

Attachments: Procurement checklist
Summary of Contracts
Intergovernmental Agreement #24-624-4000-0024 Amendment 01
BAR Retired Senior Volunteer Program
BAR Senior Companion Program
BAR Foster Grandparents Program
Item 23-0605

CITY OF SANTA FE PROCUREMENT CHECKLIST



Contractor Name: State of New Mexico Aging and Long-Term Services Department

Procurement/contract Title: Agreement #24-624-4000-0024 Amendment No. 01

Procurement Method/Vehicle: Sole Source State Price Agreement/Existing Cooperative
 Request For Proposals(RFP) Invitation To Bid (ITB) Exempt: 13-1-98
 Small Purchase (Contract Under \$60,000) Other: Grant

Requesting Department: Community Services Staff Name: Theresa Trujillo

Procurement Requirements:

Procurement files shall be maintained for all purchases and contracts, regardless of the method of procurement. The procurement files shall contain the basis on which the awards are made, all submitted bids/proposals, all evaluation materials (bid tabs or Evaluation Committee Reports), scoresheets, quotations, and all other documentation related to or prepared in conjunction with evaluations, negotiations, and the award processes. The procurements shall contain written determinations from the Requesting Departments, signed by the Chief Procurement Officers (this document), setting forth the reasoning for the contract award decisions before submitting them to the Committees.

REQUIRED DOCUMENTS FOR APPROVAL BY PURCHASING (CPD)

YES	N/A		YES	N/A	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Written Determination (srvs)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Quote(s) (3 Valid & Current for Over 20k)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	RFP - Confidential info to be provided to GB by CPD Buyer	<input checked="" type="checkbox"/>	<input type="checkbox"/>	BAR
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ITB (include bid tab)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	FIR
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Other: _____	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Certificate of Insurance (srvs)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Cooperative Agreements and GSAs and Statewide Price Agreements (include the cover page to show valid date, s page, and items to be purchased)			
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Horizon Declination or Screenshot of horizonsofnewmexico.org/services.html (srvs)			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Summary of Contract (only on contracts)			
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Current Santa Fe Business Registration (or Exemption if no tax)			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Executed Contract or Price Agreement (legal and contractor must sign before purchasing approves)			
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Chief Procurement Officer (or designee) Approval for Exempt from Procurement (use memo on our site)			
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Evaluation Committee Report (RFPs only)			
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Signed Sole Source Determination, Vendor Written Quote, SS Letter from Contractors, and 30 Days Email			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	>20k = Memo addressed to City Manager (Under 150K) Committees/City Council (Over 150K)			

Theresa Trujillo Theresa Trujillo (Apr 12, 2024 14:40 MDT)

Program Manager 3/12/2024

Department Point of Contact

Title Date

Manuel Sanchez

3/12/2024

Department Director

Date

NA

Chief Procurement Officer

Date

ITT Representative

Title Date



City of Santa Fe

Summary of Contract, Agreement, Amendment & Lease

All applicable fields to be completed by department (complete 1.b only if you are processing an amendment):

1.a Munis Contract: 3204357 Procurement # (RFP/ITB# If any):

Contractor: State of New Mexico Aging and Long Term Services Department

Procurement Method/Vehicle: Small Purchase RFP ITB Sole Source GSA Cooperative Exempt SWPA/Existing

Description/Title: Administer the Senior Volunteer Programs - Foster Grandparent Program, Senior Companion Program, Retired Senior Volunteer Program

Contract: Agreement: Lease/Rent: Amendment:

Term Start Date: 07/01/2023 Term End Date: 06/30/2024 Total Contract Amount: \$313,120.00

Approved by Council (If over the City Manager's approval threshold, you must go through GB) 10/12/2023

Contract / Lease: ALTSD Intergovernment Agreement #24-624-4000-0024

1.b Amendment #: 01 to the Original Contract/Lease # #24-624-4000-0024

Increase/(Decrease) Amount \$: (\$83,000.00)

Extend Expiration Date to:

Approved by Council (If the original went through GB, all amendments must go through GB regardless of the amendment reason) Date:

Amendment is for: Total decrease compensation amount of (\$83,000.00)

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

The City of Santa Fe Division of Senior Services has been receiving grant funds from the State of New Mexico for over 20 years to administer the Senior Volunteer Programs.

3. Procurement History: NA

Purchasing Officer Review: _____ Date: _____

Comment & Exceptions: Appropriations/Grants for money coming into the city do not come through CPD.

4. Funding Source: NM AoA - 490240 Org / Object: 2410116/Various

Andy Hopkins

Apr 22, 2024

Budget Officer Approval: _____ Date: _____

Comment & Exceptions: _____

5. Grant History (if applicable): _____

Grants Administrator Approval: Cathy M. Thompson Date Apr 22, 2024
Cathy M. Thompson, Apr 22, 2024 14:15 MDT

Staff Contact who Completed This Form: Theresa Trujillo Phone #: 505-955-4745

To be recorded by City Clerk: _____ Email: ttrujillo@santafenm.gov

Clerk #: _____

Date of Execution: _____

ITT Representative (attesting that all information is reviewed) _____ Title _____ Date _____

STATE OF NEW MEXICO

AGING & LONG-TERM SERVICES DEPARTMENT
INTERGOVERNMENTAL AGREEMENT #24-624-4000-0024
AMENDMENT No. 01

THIS AGREEMENT is made and entered into by and between the State of New Mexico, **Aging and Long-Term Services Department**, hereinafter referred to as the “Department,” and **City of Santa Fe**, hereinafter referred to as the “Contractor,” and is effective as of the date set forth below upon which it is executed by the Department and collectively as the “Parties.”

IT IS MUTUALLY AGREED BETWEEN THE PARTIES THAT THE FOLLOWING PROVISIONS OF THE ABOVE-REFERENCED CONTRACT ARE AMENDED AS FOLLOWS:

Section 1, Scope of Work, is hereby amended to read as follows:

1. **Foster Grant Parent Program (FGP)** decrease Volunteer Service Year (VSY’s) by 3 to 7, decrease service hours by 3,132 to 7,308. **Senior Companion Program (SCP)** decrease Volunteer Service Year (VSY’s) by 7 to 11, decrease service hours by 7,308 to 11,484.

Section 2, Compensation, is hereby amended to read as follows:

2. **Compensation.**
 - A. The Department shall pay to the Contractor per Attachment 2, Budget, a **decrease of (\$27,000.00) for Foster Grandparent Program (FGP), a decrease of (\$64,000) for Senior Companion Program (SCP), and a increase of \$8,000.00 for RSVP.** A total **decrease** in compensation for FY24 of **(\$83,000.00)** including GRT and expenses. The total contract compensation including this amendment will not exceed **\$230,120.00.**

All other articles to remain the same.

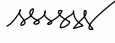
EXECUTED AND AGREED TO by signatures below.


By: _____ Date: _____
Jen Paul Schroer, Cabinet Secretary
Aging and Long-Term Services Department


By: _____ Date: _____
Anastasia Martin, General Counsel – Certifying legal sufficiency.
Aging & Long-Term Services Department

By: _____ Date: _____
Latishia Ortiz, Chief Financial Officer
Aging & Long-Term Services Department

By:  _____ Date: May 9, 2024
[Alan Webber \(May 9, 2024 10:39 MDT\)](#)
Mayor, Alan M. Webber

By:  _____ Date: May 9, 2024
Geralyn Cardenas, Interim City Clerk *XIV*
GB MTG 05/08/2024

By:  _____ Date: Apr 11, 2024
Rebecca Mnuk-Herrmann, Assistant City Attorney

By:  _____ Date: Apr 25, 2024
Emily Oster, Finance Director

ATTACHMENT 1
SCOPE OF WORK

Contract # 24-624-4000-0024-01

City of Santa Fe

4. SERVICE PROVISION

1. The Department has adopted the AmeriCorps Seniors Volunteer Program Handbook based on federal regulations for each respective program as the operating standard for state funded projects. The Services are intended to benefit the clients served, the community, and the senior volunteers themselves. One Volunteer Service Year (VSY) is equal to 1,044 hours of volunteer service. One VSY is not representative of a single volunteer but rather a volunteer or grouping of volunteers performing hours of service that equal 1,044 hours cumulative. Volunteer stipends are paid at \$4.00 per hour. RSVP does not provide stipends or allowance to volunteers.

The Contractor will provide the following Services in accordance with the final, fully executed contract and monitored through the Contractor's submission of monthly invoices for reimbursement, Quarterly Reports, Narrative Reports, and Department annual program monitoring reviews:

- a. **Foster Grandparent Program (FGP):** Recruit and place a minimum of 7 VSYs in schools, childcare centers, and other congregate settings for children or as allowable by AmeriCorps Seniors in Santa Fe County, to provide a minimum of 7,308 hours of service during the contract period.

The goals of FGP are to:

Enable persons aged 55 and older with low incomes to remain physically and mentally active and to enhance their self-esteem through continued participation in community services.

Enable children with either exceptional or special needs to achieve improved physical, mental, emotional, and/or social development.

- b. **Senior Companion Program (SCP):** Recruit and place a minimum of 11 VSYs in the homes of frail and disabled elders or as allowable by AmeriCorps Seniors in Santa Fe County, to provide a minimum of 11,484 hours of service during the contract period.

The goals of SCP are to:

Enable persons aged 55 and older with low incomes to remain physically and mentally active and to enhance their self-esteem through continued participation in community services.

Enable older adults with health and functional limitations to remain as independent as possible in their own homes.

ATTACHMENT 2
BUDGET
Contract # 24-624-4000-0024-01
CITY OF SANTA FE
Volunteer Programs

The Contractor shall provide the Services identified below as required by the Department based on the assessed need of the community and individuals receiving Services under this Contract. The amount payable under this Contract shall be made on a fixed rate for the provision of the identified Services.

The contract amendment is to provide funding for FY24 as follows:

PROGRAM	AMOUNT
Foster Grandparent Program	\$61,208.17
Senior Companion Program	\$102,304.83
Retired Senior Volunteer Program	\$66,607.00

The total amount payable under this Contract shall not exceed \$230,120.00.

Services will be provided to ALTSD-approved participants every month of the contract year in: Santa Fe County.

**New Mexico
Aging & Long Term
Services Department**

Program Name & Address
City of Santa Fe
1121 Alto St. Santa Fe, New Mexico 87501

Program: X FGP
SCP
RSVP

Project Year:
From: 7/1/2023
To: 6/30/2024

Date:
9-Feb-24

Amendment No.
1

Revised Budget***

Proposed Changes**

**Original Budget
(Full Allocation)***

Service Category	Federal	State	Local Cash	Total	Federal	State	Local Cash	Total	Federal	State	Local Cash	Total
Volunteer Support Expenses												
Grantee Personnel Expense	\$ 6,000.00	\$23,859.77	\$92,670.55	\$122,530.32					\$6,000.00	\$20,289.27	\$92,670.55	\$118,959.82
Grantee Fringe Benefits	\$9,042.00	\$5,288.00	\$50,870.37	\$65,200.37					\$9,042.00	\$5,288.00	\$50,870.37	\$65,200.37
Grantee Staff Travel	\$1,750.00	\$350.00		\$2,100.00					\$1,750.00	\$0.00	\$0.00	\$1,750.00
Grantee Equipment				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
Grantee Supplies	\$0.00	\$2,400.00		\$2,400.00					\$0.00	\$2,400.00	\$0.00	\$2,400.00
Grantee Contractual	\$0.00	\$1,332.00		\$1,332.00					\$0.00	\$1,107.00	\$0.00	\$1,107.00
Other Grantee Costs	\$600.00	\$2,950.00		\$3,550.00					\$600.00	\$200.00	\$0.00	\$800.00
				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
Volunteer Support Subtotal	\$17,392.00	\$36,179.77	\$143,540.92	\$197,112.69	\$0.00				\$17,392.00	\$29,284.27	\$143,540.92	\$190,217.19
Volunteer Expenses												
Volunteer Personnel Expense-Stipends	\$16,704.00	\$41,760.00		\$58,464.00					\$16,704.00	\$29,232.00	\$0.00	\$45,936.00
Volunteer Fringe Benefits		\$1,102.00		\$1,102.00					\$0.00	\$387.00	\$0.00	\$387.00
Volunteer Travel	\$1,262.00	\$4,634.40		\$5,896.40					\$1,262.00	\$599.90	\$0.00	\$1,861.90
Volunteer Equipment				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
Volunteer Supplies				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
Volunteer Contractual				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
Other Volunteer Costs	\$155.00	\$4,532.00		\$4,687.00					\$155.00	\$1,705.00	\$0.00	\$1,860.00
				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
Volunteer Expenses Subtotal	\$18,121.00	\$52,028.40	\$0.00	\$70,149.40	\$0.00				\$18,121.00	\$31,923.90	\$0.00	\$50,044.90
Total Budget	\$35,513.00	\$88,208.17	\$143,540.92	\$267,262.09	\$0.00				\$35,513.00	\$61,208.17	\$143,540.92	\$240,262.09

I certify that this request is required for the efficient program operation and is consistent with Program objectives:

Theresa Trujillo

Signature

Date: 02/13/2024

SSB Signature:

Approved
Disapproved

Date:

**New Mexico
Aging & Long Term
Services Department**

Program Name & Address
City of Santa Fe
1121 Alto St. Santa Fe, New Mexico 87501

Program: _____ FGP
_____ X SCP
_____ RSVIP

Project Year:
From: 7/1/2023
To: 6/30/2024

Date:
22-Apr-24

Amendment No.
2

Proposed Changes**

Revised Budget***

Service Category	Federal	State	Local Cash	Total	Federal	State	Local Cash	Total	Federal	State	Local Cash	Total
Volunteer Support Expenses												
Grantee Personnel Expense		\$25,991.63	\$25,725.37	\$51,717.00				-\$4,973.54	\$0.00	\$21,018.09	\$25,725.37	\$46,743.46
Grantee Fringe Benefits		\$12,352.00	\$14,724.48	\$27,076.48					\$0.00	\$12,352.00	\$14,724.48	\$27,076.48
Grantee Staff Travel		\$350.00		\$350.00					\$0.00	\$0.00	\$0.00	\$0.00
Grantee Equipment		\$2,500.00		\$2,500.00					\$0.00	\$2,000.00	\$0.00	\$2,000.00
Grantee Supplies		\$1,332.00		\$1,332.00					\$0.00	\$407.00	\$0.00	\$407.00
Grantee Contractual		\$3,366.00		\$3,366.00					\$0.00	\$1,250.00	\$0.00	\$1,250.00
Other Grantee Costs				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
Volunteer Support Subtotal	\$0.00	\$45,891.63	\$40,449.85	\$86,341.48	\$0.00	-\$8,864.54	\$0.00	-\$8,864.54	\$0.00	\$37,027.09	\$40,449.85	\$77,476.94

Volunteer Expenses												
Volunteer Personnel Expense-Stipends		\$75,168.00		\$75,168.00					\$0.00	\$52,200.00	\$0.00	\$52,200.00
Volunteer Fringe Benefits		\$502.00		\$502.00					\$0.00	\$0.00	\$0.00	\$0.00
Volunteer Travel		\$39,187.74		\$39,187.74					\$0.00	\$9,047.74	\$0.00	\$9,047.74
Volunteer Equipment				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
Volunteer Supplies				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
Volunteer Contractual				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
Other Volunteer Costs		\$5,555.46		\$5,555.46					\$0.00	\$4,030.00	\$0.00	\$4,030.00
				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
Volunteer Expenses Subtotal	\$0.00	\$120,413.20	\$0.00	\$120,413.20	\$0.00	-\$55,135.46	\$0.00	-\$55,135.46	\$0.00	\$65,277.74	\$0.00	\$65,277.74
Total Budget	\$0.00	\$166,304.83	\$40,449.85	\$206,754.68	\$0.00	-\$64,000.00	\$0.00	-\$64,000.00	\$0.00	\$102,304.83	\$40,449.85	\$142,754.68

I certify that this request is required for the efficient program operation and is consistent with Program objectives:

Theresa Trujillo
Signature

Date: 04/22/2024

Date: _____

Approved

Disapproved

SSB Signature: _____

New Mexico
Aging & Long Term
Services Department

Program Name & Address
 City of Santa Fe
 1121 Alito St. Santa Fe, New Mexico 87501

Program: FGP _____ SCP _____ X _____ RSVP _____

Project Year: From: 7/1/2023 To: 6/30/2024

Date: 6-Mar-24

Amendment No.: 1

Original Budget (Full Allocation)*

Proposed Changes**

Revised Budget***

Service Category	Federal	State	Local Cash	Total	Federal	State	Local Cash	Total	Federal	State	Local Cash	Total
Volunteer Support Expenses												
Grantee Personnel Expense	\$ 17,467.00	\$21,679.00	\$50,623.33	\$89,769.33				-\$6,550.00	\$17,467.00	\$15,129.00	\$50,623.33	\$83,219.33
Grantee Fringe Benefits	\$4,984.00	\$11,603.00	\$39,229.52	\$55,816.52					\$4,984.00	\$11,603.00	\$39,229.52	\$55,816.52
Grantee Staff Travel	\$445.50			\$445.50					\$445.50	\$0.00	\$0.00	\$445.50
Grantee Equipment				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
Grantee Supplies	\$393.00	\$676.00		\$1,069.00				-\$641.83	\$393.00	\$34.17	\$0.00	\$427.17
Grantee Contractual	\$80.00	\$939.75		\$1,019.75				-\$650.00	\$80.00	\$289.75	\$0.00	\$369.75
Other Grantee Costs	\$2,626.35	\$498.00		\$3,124.35				-\$298.00	\$2,626.35	\$200.00	\$0.00	\$2,826.35
				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
Volunteer Support Subtotal	\$25,995.85	\$35,395.75	\$89,852.85	\$151,244.45	\$0.00	-\$8,139.83	\$0.00	-\$8,139.83	\$25,995.85	\$27,255.92	\$89,852.85	\$143,104.62
Volunteer Expenses												
Volunteer Personnel Expense--Stipends				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
Volunteer Fringe Benefits	\$1,625.25	\$2,054.00		\$3,679.25				-\$2,054.00	\$1,625.25	\$0.00	\$0.00	\$1,625.25
Volunteer Travel	\$7,002.40	\$12,342.25		\$19,344.65				\$8,421.33	\$7,002.40	\$20,763.58	\$0.00	\$27,765.98
Volunteer Equipment				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
Volunteer Supplies				\$0.00				\$13,000.00	\$0.00	\$13,000.00	\$0.00	\$13,000.00
Volunteer Contractual				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
Other Volunteer Costs	\$2,876.50	\$8,815.00		\$11,691.50				-\$3,227.50	\$2,876.50	\$5,587.50	\$0.00	\$8,464.00
				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
				\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
Volunteer Expenses Subtotal	\$11,504.15	\$23,211.25	\$0.00	\$34,715.40	\$0.00	\$16,139.83	\$0.00	\$16,139.83	\$11,504.15	\$39,351.08	\$0.00	\$50,855.23
	\$37,500.00	\$58,607.00	\$89,852.85	\$185,959.85	\$0.00	\$8,000.00	\$0.00	\$8,000.00	\$37,500.00	\$66,607.00	\$89,852.85	\$193,959.85

SSB Signature: _____

Date: 03/06/2024

I certify that this request is required for the efficient program operation and is consistent with Program objectives:
Theresa Trujillo
 Signature _____

Approved _____
 Disapproved _____

Log # {Finance use <u>only</u> }:	
Journal # {Finance use <u>only</u> }:	

City of Santa Fe, New Mexico BUDGET AMENDMENT RESOLUTION (BAR)

DEPARTMENT / DIVISION NAME				DATE	
Community Health and Safety/Senior Services				3/12/2024	
ITEM DESCRIPTION	ORG	OBJECT	PROJECT	INCREASE	DECREASE
				<i>{enter as <u>positive</u> #}</i>	<i>{enter as <u>negative</u> #}</i>
Salaries (General)	2410116	500110	COM2424101		(3,571)
Other Consulting	2410116	510340	COM2424101		(513)
Operating Supplies	2410116	530200	COM2424101		(450)
Food	2410116	530400	COM2424101		(1,800)
Software Subscriptions	2410116	530710	COM2424101		(225)
Gasoline	2410116	531000	COM2424101		(350)
Misc. Insurance Prem	2410116	531000	COM2424101		(202)
Stipends	2410116	561850	COM2424101		(12,528)
In State Transportation	2410116	531000	COM2424101		(4,035)
In State PerDiem	2410116	560250	COM2424101		(1,897)
Registration	2410116	560700	COM2424101		(150)
Recognition	2410116	562850	COM2424101		(480)
Recruitment	2410116	562900	COM2424101		(800)
REVENUES				<i>{enter as <u>negative</u> #}</i>	<i>{enter as <u>positive</u> #}</i>
NM Agency on Aging	2410116	490240	COM2424101		27,000
JUSTIFICATION: <i>(use additional page if needed)</i> --Attach supporting documentation/memo				\$	-
				-	-

New Mexico Aging and Long Term Services Senior Volunteer Programs amendment decrease Foster Grandparent Program	<i>{Complete section below if BAR results in a net change to ANY Fund}</i>	
	Fund(s) Affected	Fund Balance Increase/(Decrease)
	TOTAL:	0

Theresa Trujillo	3/12/2024	<i>{Use this form for Finance Committee/ City Council agenda items ONLY}</i>	<i>Andy Hopkins</i>	Apr 22, 2024
Prepared By <i>{print name}</i>	Date	CITY COUNCIL APPROVAL	Budget Officer	Date
<u><i>Manuel Sanchez</i></u>	Date		Finance Director <i>{≤ \$5,000}</i>	Date
Manuel Sanchez (Apr 12, 2024 15:24 MDT)	Date		City Council Approval Date	Date
Division Director Signature <i>{optional}</i>	Date	Agenda Item #:	City Manager <i>{≤ \$60,000}</i>	Date
<i>Maria Tucker</i>	Date			
Department Director Signature	Date			

Log # {Finance use <u>only</u> }:	
Journal # {Finance use <u>only</u> }:	

City of Santa Fe, New Mexico BUDGET AMENDMENT RESOLUTION (BAR)

DEPARTMENT / DIVISION NAME				DATE	
Community Health and Safety/Senior Services				3/12/2024	
ITEM DESCRIPTION	ORG	OBJECT	PROJECT	INCREASE	DECREASE
				<i>{enter as <u>positive</u> #}</i>	<i>{enter as <u>negative</u> #}</i>
Salaries (General)	2410116	500110	COM2424104		(6,550)
Other Consulting	2410116	510340	COM2424104		(465)
Office Supplies	2410116	530100	COM2424104		(375)
Operating Supplies	2410116	530200	COM2424104		(267)
Operating Supplies	2410116	530200	COM2424104	13,000	
Uniform Clothing & Linen	2410116	530500	COM2424104		(700)
Software Subscriptions	2410116	530710	COM2424104	50	
Misc. Insurance Prem	2410116	555860	COM2424104		(2,054)
In State Transportation	2410116	560550	COM2424104	8,421	
Registration	2410116	560700	COM2424104		(900)
Advertising	2410116	561850	COM2424104		(298)
Recognition	2410116	562850	COM2424104		(1,863)
REVENUES				<i>{enter as <u>negative</u> #}</i>	<i>{enter as <u>positive</u> #}</i>
NM Agency on Aging	2410116	490240	COM2424104	(8,000)	
JUSTIFICATION: <i>(use additional page if needed)</i> <i>--Attach supporting documentation/memo</i>				\$ 13,471	\$ (13,471)

New Mexico Aging and Long Term Services Senior Volunteer Programs amendment decrease Retired Senior Volunteer Program	<i>{Complete section below if BAR results in a net change to ANY Fund}</i>	
	Fund(s) Affected	Fund Balance Increase/(Decrease)
	TOTAL:	0

Theresa Trujillo <i>Theresa Trujillo</i> <small>Theresa Trujillo (Apr 25, 2024 15:50:10DT)</small> Prepared By <i>{print name}</i>	3/12/2024 Date	<i>{Use this form for Finance Committee/ City Council agenda items ONLY}</i>	<i>Andy Hopkins</i> Budget Officer	Apr 26, 2024 Date
Manuel Sanchez Division Director Signature <i>{optional}</i>	Apr 26, 2024 Date	CITY COUNCIL APPROVAL City Council Approval Date	Finance Director <i>{≤ \$5,000}</i>	Date
Maria Tucker Department Director Signature	Apr 26, 2024 Date	Agenda Item #:	City Manager <i>{≤ \$60,000}</i>	Date

Log # {Finance use <u>only</u> }:	
Journal # {Finance use <u>only</u> }:	

City of Santa Fe, New Mexico BUDGET AMENDMENT RESOLUTION (BAR)

DEPARTMENT / DIVISION NAME				DATE	
Community Health and Safety/Senior Services				3/12/2024	
ITEM DESCRIPTION	ORG	OBJECT	PROJECT	INCREASE	DECREASE
				<i>{enter as <u>positive</u> #}</i>	<i>{enter as <u>negative</u> #}</i>
Salaries (General)	2410116	500110	COM2424103		(4,974)
Other Consulting	2410116	510340	COM2424103		(300)
Office Supplies	2410116	530100	COM2424103		(300)
Operating Supplies	2410116	530200	COM2424103		(200)
Food	2410116	530400	COM2424103		(966)
Uniform Clothing & Linen	2410116	530500	COM2424103		(700)
Software Subscriptions	2410116	530710	COM2424103		(225)
Gasoline	2410116	531000	COM2424103		(350)
Misc. Insurance Prem	2410116	555860	COM2424103		(202)
In State PerDiem	2410116	560250	COM2424103		(1,525)
In State Transportation	2410116	560550	COM2424103		(30,140)
Registration	2410116	560700	COM2424103		(150)
Advertising	2410116	561850	COM2424103		(1,000)
Stipends	2410116	562975	COM2424103		(22,968)
REVENUES				<i>{enter as <u>negative</u> #}</i>	<i>{enter as <u>positive</u> #}</i>
NM Agency on Aging	2410116	490240	COM2424103		64,000
JUSTIFICATION: <i>(use additional page if needed)</i> --Attach supporting documentation/memo					0

New Mexico Aging and Long Term Services Senior Volunteer Programs amendment decrease Senior Companion Program	<i>{Complete section below if BAR results in a net change to ANY Fund}</i>	
	Fund(s) Affected	Fund Balance Increase/(Decrease)
	TOTAL:	0

Theresa Trujillo <u>Theresa Trujillo</u> <small>Theresa Trujillo (Apr 26, 2024 15:30 MDT)</small>	3/12/2024	{Use this form for Finance Committee/ City Council agenda items ONLY}	<u>Andy Hopkins</u> Budget Officer	Apr 26, 2024
Prepared By {print name}	Date	CITY COUNCIL APPROVAL City Council Approval Date <input style="width: 100px; height: 20px;" type="text"/> Agenda Item #: <input style="width: 100px; height: 20px;" type="text"/>	Date	
<u>Manuel Sanchez</u>	Apr 26, 2024		Finance Director {≤ \$5,000}	Date
<small>Division Director Signature {optional}</small>	Date		City Manager {≤ \$60,000}	Date
<u>Maria Tucker</u>	Apr 26, 2024		Date	
Department Director Signature	Date		Date	

Contract Review Form

City of Santa Fe *Will* *Will not* be relinquishing FY24 funding.
 Entity name

Please complete if relinquishing FY24 funding

Program	Amount of Relinquishment if different from notification amount	Current VSYs (FGP/SCP)	Amended VSYs (FGP/SCP)	Current Volunteers (RSVP only)	Amended Volunteers (RSVP only)	County	Permanent (P) or One-time (O) Reduction
FGP	\$27,000.00	10	7			Santa Fe	(O)
SCP	\$64,000.00	18	11			Santa Fe	(O)

City of Santa Fe *Will* *Will not* be requesting additional FY24 funding.
 Entity name

Please complete if requesting additional FY24 funding:

Program	Allocation Increase Amount Requested	Current VSYs (FGP/SCP)	Amended VSYs (FGP/SCP)	Current Volunteers (RSVP only)	Amended Volunteers (RSVP only)	County	Permanent (P) or One-time (O) Reduction
FGP							
SCP							
RSVP	\$8,000.00					Santa Fe	(O)

*** Justification must be submitted separately for all allocation increase requests.

Sign ***Theresa Trujillo*** Date February 26., 2024

Contract ID#24-624-4000-0024

Item #23-0605

STATE OF NEW MEXICO

**AGING & LONG-TERM SERVICES DEPARTMENT
INTERGOVERNMENTAL AGREEMENT #24-624-4000-0024**

THIS AGREEMENT is made and entered into by and between the State of New Mexico, **Agging and Long-Term Services Department**, hereinafter referred to as the "Department," and **City of Santa Fe**, hereinafter referred to as the "Contractor," and is effective as of the date set forth below upon which it is executed by the Department and collectively as the "Parties."

IT IS AGREED BETWEEN THE PARTIES:

1. Scope of Work.

A. The Contractor shall perform the work outlined in the Scope of Work, which is hereby incorporated and made a part of this contract as Attachment 1.

2. Compensation.

A. The Department shall pay to the Contractor in full payment for services satisfactorily performed based upon deliverables as outlined in the Scope of Work. **The total amount payable to the Contractor under this Agreement, including gross receipts tax, travel, and expenses, shall not exceed \$313,120.00 as listed in Attachment 2. 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 Department 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 Department. All invoices **MUST BE** received by the Department no later than fifteen (15) days after the termination of the Fiscal Year in which the services were delivered. Invoices received after such date will not be paid.

C. Contractor must submit a detailed statement accounting for all services performed and expenses incurred. Reimbursements shall be made by the Department on a monthly basis upon receipt of monthly expenditures and reports furnished by the Contractor. If the Department 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 Department 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 Department shall not incur late charges, interest, or penalties for failure

Contract ID#24-624-4000-0024

to make payment within the time specified herein.

For purchases funded by state or federal grants to the Contractor, if the Contractor has not received the funds from the federal or state funding Department but has already certified that the services or items of tangible personal property have been received and accepted, payment shall be tendered to the Contractor within five working days of receipt of funds from that funding Department.

3. Term.

THIS AGREEMENT SHALL BECOME EFFECTIVE UNTIL APPROVED BY THE AGENCY. This agreement shall terminate on **June 30, 2024**, unless terminated pursuant to paragraph 4 (Termination), or paragraph 5 (Appropriations) or for any other reason allowed by law. 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. Grounds. The Department may terminate this Agreement for convenience or cause. The Contractor may only terminate this Agreement based upon the Department's uncured, material breach of this Agreement.

B. Notice; Department Opportunity to Cure.

1. Except as otherwise provided in Paragraph (4)(B)(3), the Department shall give Contractor written notice of termination at least thirty (30) days prior to the intended date of termination.

2. Contractor shall give Department written notice of termination at least thirty (30) days prior to the intended date of termination, which notice shall (i) identify all the Department's material breaches of this Agreement upon which the termination is based and (ii) state what the Department must do to cure such material breaches. Contractor's notice of termination shall only be effective (i) if the Department does not cure all material breaches within the thirty (30) day notice period or (ii) in the case of material breaches that cannot be cured within thirty (30) days, the Department does not, within the thirty (30) day notice period, notify the Contractor of its intent to cure and begin with due diligence to cure the material breach.

3. Notwithstanding the foregoing, this Agreement may be terminated immediately upon written notice to the Contractor (i) if the Contractor becomes unable to perform the services contracted for, as determined by the Department; (ii) if, during the term of this Agreement, the Contractor is suspended or debarred by the State Purchasing Agent; or (iii) the Agreement is terminated pursuant to Paragraph 5, "Appropriations", of this Agreement.

C. Liability. Except as otherwise expressly allowed or provided under this Agreement, the Department's sole liability upon termination shall be to pay for acceptable work performed prior to the Contractor's receipt or issuance of a notice of termination; 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. This provision is not exclusive and does not waive the Department's other legal rights and remedies caused by the Contractor's default/breach of this Agreement.

Contract ID#24-624-4000-0024

D. **Termination Management.** Immediately upon receipt by either the Department 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 Department; 2) comply with all directives issued by the Department in the notice of termination as to the performance of work under this Agreement; and 3) take such action as the Department shall direct for the protection, preservation, retention or transfer of all property titled to the Department 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 Department upon termination and shall be submitted to the Department as soon as practicable.

5. **Appropriations.**

The terms of this Agreement are contingent upon sufficient appropriations and authorization being made by the Legislature of New Mexico for the performance of this Agreement. If sufficient appropriations and authorization are not made by the Legislature, this Agreement shall terminate immediately upon written notice being given by the Department to the Contractor. The Department's decision as to whether sufficient appropriations are available shall be accepted by the Contractor and shall be final. If the Department 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 Department and are not employees of the State of New Mexico. The Contractor and its agents and employees shall not accrue leave, retirement, insurance, bonding, use of state vehicles, or any other benefits afforded to employees of the State of New Mexico 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, unless the contract is between two public entities. The Contractor agrees not to purport to bind the State of New Mexico 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 Department.

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 Department. 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 Department.

Contract ID#24-624-4000-0024

9. Release.

Final payment of the amounts due under this Agreement shall operate as a release of the Department, its officers and employees, and the State of New Mexico 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 Department.

Disclosure of confidential information shall only be made in accordance with the Inspection of Public Records Act or the applicable state or federal law or regulations.

11. Product of Service – Copyright.

All materials developed or acquired by the Contractor under this Agreement shall become the property of the State of New Mexico and shall be delivered to the Department 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. Without in anyway limiting the generality of the foregoing, the Contractor specifically represents and warrants that:

1) in accordance with Section 10-16-4.3 NMSA 1978, the Contractor does not employ, has not employed, and will not employ during the term of this Agreement any Department employee while such employee was or is employed by the Department and participating directly or indirectly in the Department's contracting process;

2) this Agreement complies with Section 10-16-7(A) NMSA 1978 because (i) the Contractor is not a public officer or employee of the State; (ii) the Contractor is not a member of the family of a public officer or employee of the State; (iii) the Contractor is not a business in which a public officer or employee or the family of a public officer or employee has a substantial interest; or (iv) if the Contractor is a public officer or employee of the State, a member of the family of a public officer or employee of the State, or a business in which a public officer or employee of the State or the family of a public officer or employee of the State has a substantial interest, public notice was given as required by Section 10-16-7(A) NMSA 1978 and this Agreement was awarded pursuant to a competitive process;

3) in accordance with Section 10-16-8(A) NMSA 1978, (i) the Contractor is not, and has not been represented by, a person who has been a public officer or employee

Contract ID#24-624-4000-0024

of the State within the preceding year and whose official act directly resulted in this Agreement and (ii) the Contractor is not, and has not been assisted in any way regarding this transaction by, a former public officer or employee of the State whose official act, while in State employment, directly resulted in the Department's making this Agreement;

4) this Agreement complies with Section 10-16-9(A) NMSA 1978 because (i) the Contractor is not a legislator; (ii) the Contractor is not a member of a legislator's family; (iii) the Contractor is not a business in which a legislator or a legislator's family has a substantial interest; or (iv) if the Contractor is a legislator, a member of a legislator's family, or a business in which a legislator or a legislator's family has a substantial interest, disclosure has been made as required by Section 10-16-9(A) NMSA 1978, this Agreement is not a sole source or small purchase contract, and this Agreement was awarded in accordance with the provisions of the Procurement Code;

5) in accordance with Section 10-16-13 NMSA 1978, the Contractor has not directly participated in the preparation of specifications, qualifications or evaluation criteria for this Agreement or any procurement related to this Agreement; and

6) in accordance with Section 10-16-3 and Section 10-16-13.3 NMSA 1978, the Contractor has not contributed, and during the term of this Agreement shall not contribute, anything of value to a public officer or employee of the Department.

C. Contractor's representations and warranties in Paragraphs A and B of this Article 12 are material representations of fact upon which the Department relied when this Agreement was entered into by the parties. Contractor shall provide immediate written notice to the Department 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 Department and notwithstanding anything in the Agreement to the contrary, the Department may immediately terminate the Agreement.

D. All terms defined in the Governmental Conduct Act have the same meaning in this Article 12(B).

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 Department 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. Merger.

This Agreement incorporates all the Agreements, covenants and understandings between the parties hereto concerning the subject matter hereof, and all such covenants, Agreements and

Contract ID#24-624-4000-0024

understandings have been merged into this written Agreement. No prior Agreement or understanding, oral or otherwise, of the parties or their agents shall be valid or enforceable unless embodied in this Agreement.

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 executive orders of the Governor of the State of New Mexico, 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 Department.

19. Records and Financial Audit.

The Contractor shall maintain detailed time and expenditure records that indicate the date; time, nature and cost of services rendered during the Agreement's term and effect and retain them for a period of three (3) years from the date of final payment under this Agreement. The records shall be subject to inspection by the Department, the Department of Finance and Administration and the State Auditor. The Department shall have the right to audit billings both before and after payment. Payment under this Agreement shall not foreclose the right of the Department to recover excessive or illegal payments.

Contract ID#24-624-4000-0024

If, pursuant to this Agreement, the Contractor receives federal funds subject to the Single Audit Act, the Contractor shall submit to the Department an audit conducted by a certified public accountant in compliance with the Single Audit Act.

20. Indemnification.

Neither party shall be responsible for liability incurred as a result of the other party's acts or omissions in connection with this Agreement. Any liability incurred in connection with this Agreement is subject to the immunities and limitation of the New Mexico Tort Claims Act.

21. 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.

22. 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.

23. 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 Department: Andrea Segura
Aging and Long-Term Services Department
2550 Cerrillos Rd
Santa Fe, NM 87505

To the Contractor: City of Santa Fe
PO Box 909
Santa Fe, NM 87504-0909

24. 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.

Contract ID#24-624-4000-0024

EXECUTED AND AGREED TO by signatures below.

DocuSigned by:
 By: *Jen Paul Schroer* Date: 10/18/2023
AD29141557P1008
Jen Paul Schroer, Cabinet Secretary
 Aging and Long-Term Services Department

DocuSigned by:
 By: *Anastasia Martin* Date: 10/18/2023
4EAE72088A218F
Anastasia Martin, General Counsel – Certifying legal sufficiency
 Aging & Long-Term Services Department

DocuSigned by:
 By: *Blanca Sena* Date: 10/13/2023
903124159185
Blanca Sena, Chief Financial Officer
 Aging & Long-Term Services Department

By: *AM* Date: Oct 12, 2023
 Mayor, Alan M. Webber

By: *[Signature]* Date: _____
Geralyn Cardenas (Oct 12, 2023 19:05 MDT)
 Geralyn Cardenas, Interim City Clerk *XIV*
 GB MTG 10/11/2023

By: *Marcos Martinez* Date: Jun 12, 2023
Marcos Martinez (Jun 12, 2023 08:10 MDT)
 Marcos Martinez, Senior Assistant City Attorney

By: *Emily K. Oster* Date: Sep 29, 2023
Emily K. Oster (Sep 29, 2023 13:45 MDT)
 Emily Oster, Finance Director

Contract ID#24-624-4000-0024

ATTACHMENT 1

SCOPE OF WORK

ALTSD Contract # 24-624-4000-0024

Between

**New Mexico Aging & Long-Term Services Department and
City of Santa Fe**

A. SCOPE OF WORK

1. PURPOSE

The purpose of the Contract is to ensure that volunteer programs (Services) authorized by the Aging and Long-Term Services Department (Department) provide meaningful opportunities for older adults to engage in their communities and help address critical community needs. For the purposes of this Scope of Work, "Services" is defined as the Foster Grandparent Program, the Senior Companion Program, and the RSVP (formally Retired Senior Volunteer Program). Descriptions and authorizations for the Services are set forth below. The Services should produce results that support ALTSD's mission and goals set forth in its Strategic Plan. The Services provided for in this Contract shall address the following specific issue and/or deliverable: supporting older adults to remain independent, at home and contributing to the community.

Services provided for under this Contract are as follows:

- a. The **Foster Grandparent Program (FGP)** is authorized under Title II, Part B, of the Domestic Volunteer Service Act of 1973, as amended (Public Law 93-113). The purpose of the program is to provide opportunities for persons aged 55 or older with low incomes to provide supportive person-to-person services to help alleviate the physical, mental, or emotional problems of youth, less than 21 years of age, with special or exceptional needs.
- b. The **Senior Companion Program (SCP)** is authorized under Title II, Part C, of the Domestic Volunteer Service Act of 1973, as amended (Public Law 93-113). The purpose of the program is to provide opportunities for persons aged 55 or older with low incomes to provide supportive person-to-person services to older adults with health and functional limitations to enable them to remain as independent as possible in their own homes.

Both the **Foster Grandparent Program (FGP)** and the **Senior Companion Program (SCP)** engage persons aged 55 and older, particularly those with limited incomes, in volunteer service to meet critical community needs and provide a high-quality experience to enrich the lives of the volunteers.

- c. **RSVP (formally Retired Senior Volunteer Program)** secures and facilitates a variety of opportunities for persons aged 55 and older to contribute their skills and expertise to community projects and organizations. RSVP is authorized under Title II, Part A, of the Domestic Volunteer Service Act of 1973, as amended (Public Law 93-113). The purpose of the program is to provide opportunities for people aged 55 or older to engage in volunteer activities designed to meet critical community needs.

2. POPULATIONS TO BE SERVED

Contract ID#24-624-4000-0024

1. **FGP** volunteers shall serve children under the age of 21 who have special or exceptional needs, through one-on-one tutoring and mentoring, to maintain or improve the children's health status and psychosocial functioning.
2. **SCP** volunteers shall serve adults, primarily older adults, with physical, emotional and/or mental health limitations, by providing person-to-person support and companionship necessary to maintain the adults' independent living and an enhanced quality of life.
3. **RSVP** volunteers shall serve their communities by participating in special projects and supporting organizations to meet identified critical needs.

The Contractor shall be responsible for the provision of Services in: Santa Fe County, which shall be referred to as the "Service Area."

3. **RESPONSIBILITIES OF THE CONTRACTOR**

1. **Program Requirements:**

- a. The Contractor must be designated as an official AmeriCorps Seniors program through the federal AmeriCorps (formerly known as Corporation for National and Community Service) organization in the designated Service Area.
- b. As required by the Department, the Contractor shall administer all or part of the Services in the designated Service Area, in accordance with the finalized, fully executed contract.
- c. The Contractor shall comply with all current rules and regulations pursuant to the Laws of the State of New Mexico (9.2.14 NMAC; 9.2.15 NMAC; 9.2.16 NMAC), Department policies and procedures, and AmeriCorps Seniors federal statutes and guidelines applicable to each of the Services.
- d. The Contractor shall establish and maintain staff positions to perform all contractual obligations including but not limited to management, supervision, service provision coordination, accounting, data collection and reporting.
- e. The Contractor shall be responsible for outreach, recruitment, and placement of volunteers in Volunteer Station(s). As used in this Contract, Volunteer Stations are public agencies, secular or faith-based private non-profit organizations, or health care organizations that accept the responsibility of assignment and supervision of volunteers. The placement of volunteers shall be governed by a Memorandum of Understanding (MOU) between the Contractor and the Volunteer Station(s). If a MOU does not exist between the Contractor and the Volunteer Station, the Contractor shall execute said MOU within 15 days of final execution of this Contract.
- f. In conjunction with a Volunteer Station, the Contractor shall develop an assignment plan which clearly sets forth the outcomes and activities by which

Contract ID#24-624-4000-0024

each volunteer will be measured as well as documentation demonstrating whether deliverables as set forth in the Contract have been met. The activity plan shall be in writing and implemented within 15 days of the volunteer's start date. The Contractor shall provide to the Department each volunteer's assignment plan within 5 days of the Department's written request.

- g. The Contractor shall comply with the National Service Criminal History Check (Criminal Check) requirements for volunteers and employees, as mandated by AmeriCorps Seniors prior to a volunteer's start date. All required Criminal Checks will be completed at the Contractor's expense. Criminal Checks are an allowable expense under the contract.
- h. The Contractor shall ensure that each volunteer meets the eligibility criteria as specified by AmeriCorps Seniors program guidelines as required in the federal program regulations.
- i. The Contractor shall ensure that all required paperwork and forms are completed and current for all volunteers in accordance with the AmeriCorps Seniors handbook. The Contractor shall provide to the Department all AmeriCorps Seniors required paperwork and forms within 5 days of the Department's written request.
- j. The Contractor shall plan and implement annual recognition events for volunteers in accordance with the AmeriCorps Seniors program handbook and in coordination with its Advisory Council. Recognition events shall be provided as resources permit one time per state fiscal year (per FGP, SCP, RSVP program if held separately), without prior written permission from the Department. The Contractor shall include documentation, including the number of recognition event attendees in its bi-annual report to the Department.

2. Performance Measures/ Fiscal Requirements:

- i. The Contractor shall develop and submit an annual work plan and budget that identifies all projected services, expenditures, and outlines how all funds will be spent, including justification for each program to coincide with awarded amounts within the Department's deadline. Separate budgets, justifications and program plans are to be submitted for each program - FGP, SCP, RSVP, and each service area, administered by the Contractor.
- ii. The Contractor shall submit to the Department monthly an invoice for reimbursement. The invoice for reimbursement shall be due on the 12th day of the month, for the prior month's expenditures until all funds are spent, and a final report shall be due as required by the Department each year.
- iii. The Contractor shall upload to the corresponding monthly file in Revver (formerly e-File Rubex) all invoices for reimbursement and supporting

Contract ID#24-624-4000-0024

documentation to include workbook detail, statements, invoices and proof of payment, timesheets, general ledger, etc.

- iv. The Contractor will evaluate allocation balances in collaboration with the assigned Program Coordinator mid-fiscal year (December) to determine if there is a need to relinquish or request additional funding (if available). Inability by the Contractor to fully expend contract allocation by June 30 may result in a reduction in the contract allocation.
- v. The Contractor shall submit to the Department a Service Modification Request form when community need, identified by the Contractor or Department warrants modification to the service provisions outlined within this contract. Service modification requests shall remain within the intent of FGP, SCP, and RSVP programs scope of work. Approval of service modification requests shall be determined by the Department.
- vi. The Contractor shall submit to the Department a Budget Adjustment Request (BAR) for review and approval when the restructuring of allocation, increase to allocation, or decrease to allocation will result in changes to contracted volunteer service year (VSY) or hours of service.
- vii. The Contractor shall provide records, reports, other documents, and access to facilities as requested by Department staff within 5 business days.

3. Performance Measures/ Reporting Requirements:

- a. The Contractor shall submit semi-annual narrative reports for the purpose of reporting program activities for the contract year using the template provided by the Department. The Contractor shall upload the reports to the Revver (formerly e-File Rubex) system folder titled "Reports". The due dates for the reports are as follows:
 - 1. **February 1st for the period July 1–December 31**
 - 2. **August 1st for the period January 1– June 30**
- b. The Contractor shall submit a copy of the AmeriCorps Seniors annual Progress Report Supplement document to the Department by February 1 in combination with the semi-annual narrative report to the Revver (formerly e-File Rubex) folder titled "Reports".
- c. The Contractor shall submit quarterly volunteer data reports for the contract term utilizing the quarterly data surveys distributed by the Department. Each

Contract ID#24-624-4000-0024

report is due according to the annual Volunteer Calendar provided by the Department (subject to change).

- d. The Contractor shall keep all documentation, including, but not limited to, reports, data, forms, and invoices for a minimum of 6 years. Such documentation shall be made available to the Department within 5 days of its request.

4. DEPARTMENT OVERSIGHT

1. Department staff shall conduct periodic site visits (with or without notice) with the Contractor, to evaluate progress, identify best practices or problem areas, and to determine actions to be taken by parties to resolve any issues that the Department identifies. The site visits will include, but not limited to visiting volunteer stations, clients, and Contractors' place of business.
2. Department staff shall conduct monitoring of the Contractor for compliance with performance measures and scope of work deliverables throughout the term of the contract, which may include desk reviews of fiscal and programmatic documentation, and on-site monitoring, the frequency of which shall be determined by the Department, at its sole discretion. The Department shall produce, and provide to the Contractor, a report(s) of its findings. The Contractor shall cooperate with Department staff in the monitoring process by granting access to the Contractors program and fiscal records (for all funding sources, both electronic and hard copy).
3. The Department shall review, certify, and disburse reimbursements to the Contractor, upon receipt of complete and accurate monthly invoices and supporting documentation to include workbook detail, statements, invoices and proof of payment, timesheets, general ledger, etc. The Department shall determine at its sole discretion whether an invoice and supporting documentation is sufficient, complete, and accurate to permit disbursement of funds.
4. The Contractor authorizes the Department, the federal government, or their designees, to perform audits and/or inspections of its records, at any reasonable time, to assure compliance with state or federal government terms and/or to evaluate the Contractor's performance for all funding sources.

5. SERVICE PROVISION

1. The Department has adopted the AmeriCorps Seniors Volunteer Program Handbook based on federal regulations for each respective program as the operating standard for state funded projects. The Services are intended to benefit the clients served, the community, and the senior volunteers themselves. One Volunteer Service Year (VSY) is equal to 1,044 hours of volunteer service. One VSY is not representative of a single volunteer but rather a volunteer or grouping of volunteers performing hours

Contract ID#24-624-4000-0024

of service that equal 1,044 hours cumulative. Volunteer stipends are paid at \$4.00 per hour. RSVP does not provide stipends or allowance to volunteers.

The Contractor will provide the following Services in accordance with the final, fully executed contract and monitored through the Contractor's submission of monthly invoices for reimbursement, Quarterly Reports, Narrative Reports, and Department annual program monitoring reviews:

- a. **Foster Grandparent Program (FGP):** Recruit and place a minimum of 10 VSYs in schools, childcare centers, and other congregate settings for children or as allowable by AmeriCorps Seniors in Santa Fe County, to provide a minimum of 10,440 hours of service during the contract period.

The goals of FGP are to:

Enable persons aged 55 and older with low incomes to remain physically and mentally active and to enhance their self-esteem through continued participation in community services.

Enable children with either exceptional or special needs to achieve improved physical, mental, emotional, and/or social development.

- b. **Senior Companion Program (SCP):** Recruit and place a minimum of 18 VSYs in the homes of frail and disabled elders or as allowable by AmeriCorps Seniors in Santa Fe County, to provide a minimum of 18,792 hours of service during the contract period.

The goals of SCP are to:

Enable persons aged 55 and older with low incomes to remain physically and mentally active and to enhance their self-esteem through continued participation in community services.

Enable older adults with health and functional limitations to remain as independent as possible in their own homes.

- c. **RSVP:** Recruit and place a minimum of 59 volunteers in community placements in Santa Fe County, to provide a minimum of 59,000 hours of service during the contract period.

The goals of RSVP are to:

Enable persons aged 55 and older to remain physically and mentally active and to enhance their self-esteem through continued participation in community services.

Enable communities to enhance their efforts in meeting identified needs through using the skills of older adult volunteers.

- b. Recruit volunteers willing to be Older Adult Peer Specialist certified through HSD, Community Health Workers certified through DOH, or Ombudsman volunteers with

Contract ID#24-624-4000-0024

ALTSD by providing opportunities through MOUs to RSVP participates to use their existing experience, skills, and training to work with older adults living with behavioral health challenges.

Contract ID#24-624-4000-0024

ATTACHMENT 2

BUDGET

**Contract # 24-624-4000-0024
CITY OF SANTA FE
Volunteer Programs**

The Contractor shall provide the Services identified below as required by the Department based on the assessed need of the community and individuals receiving Services under this Contract. The amount payable under this Contract shall be made on a fixed rate for the provision of the identified Services.

The contract amendment is to provide funding for FY24 as follows:

PROGRAM	AMOUNT
Foster Grandparent Program	\$88,208.17
Senior Companion Program	\$166,304.83
Retired Senior Volunteer Program	\$58,607.00

The total amount payable under this Contract shall not exceed \$313,120.00.

Services will be provided to ALTSD-approved participants every month of the contract year in: Santa Fe County.

VOLUNTEER PROGRAM BUDGET

PROGRAM NAME: City of Santa Fe Division of Senior Services

PROGRAM: (check one)

FGP:



SCP:



RSVP:



FY24

Category	Funding Source			TOTAL BUDGETED
	FEDERAL	STATE	LOCAL	
A. Volunteer Support Expenses				
1. GRANTEE PERSONNEL EXPENSES (Position/Title, Annual Salary, % of time)				
SCP/FGP Program Manager	2000.00	7953.26	34902.86	44856.12
\$74760.19 @ 60%				0.00
SCP/FGP Project Administrator	2000.00	7953.26	38988.50	48941.76
\$61,777.20 @ 80%				0.00
SCP/FGP Van Driver	2000.00	7953.25	18779.19	28732.44
\$38,309.93 @ 75%				0.00
Category Total	6000.00	23859.77	92670.55	122530.32
2. GRANTEE FRINGE BENEFITS (Item Description, dollar amounts only, NO percentage breakout)				
FICA/Medicare for three staff @ 7.65% Total of \$9,373.56	1,642.00	1,988.00	5,743.56	9,373.56
Employee Insurance (negotiated cost with Cigna). Total of \$24,520.14	5,600.00	1,500.00	17,420.14	24,520.14
PERA for three employees @ 20.7875%. Total of \$26,543.14 for 3 employees	1,800.00	1,800.00	22,943.14	26,543.14
Dental insurance for three employees. Total of \$1,278.99 for 3 employees			1,278.99	1,278.99
NM Retiree Health for three employees. Total of \$2,269 for 3 employees			2,269.08	2,269.08
Worker's Comp for three employees. \$1,215.46 for 3 employees			1,215.46	1,215.46
Category Total	9,042.00	5,288.00	50,870.37	65,200.37
3. GRANTEE STAFF TRAVEL (Purpose-Expense Calculation) Indicate mileage reimbursement rates.				
In State Gas and Auto Maintenance. 778 x .45 per mile		350.00		350.00
Out of State - One program staff to attend National Conference. Meals/Lodging \$1,050. Transportation \$700.00	1,750.00			1,750.00
Category Total	1,750.00	350.00	0.00	2,100.00
4. GRANTEE EQUIPMENT (Item/purpose, quantity, estimated total cost)				
				0.00
				0.00
Category Total	0.00	0.00	0.00	0.00
5. GRANTEE SUPPLIES (Item, estimated total cost)				
Office Supplies. Toners, paper, labels, post it notes, pens, highlighters, etc. 100 per month X 12 months		1,200.00		1,200.00
Operating Supplies.volunteer training and inservice projects. Gloves, trash bags, vests, tupperware, paper goods, etc. 100 per month x 12 months.		1,200.00		1,200.00
Category Total	0.00	2,400.00	0.00	2,400.00
6. GRANTEE CONTRACTUAL SERVICES (Purpose, total contracted cost)				
Volunteer software		350.00		350.00
Staff uniform \$700 mandated per union. One employee (Driver)		700.00		700.00
Background Check Field Print, True Screen		282.00		282.00
35.25 x 8				0.00
Category Total	0.00	1,332.00	0.00	1,332.00
7. OTHER GRANTEE COSTS (Purpose, actual/estimated total cost)				
Recruitment-\$700 for outreach Materials and \$700 Advertising	600.00	800.00		1,400.00
Food for in service Trainings 12 * 166.67		2,000.00		2,000.00
Registration for volunteers and staff to attend Conference on Aging 15@\$10.00		150.00		150.00
			0.00	0.00
Category Total	600.00	2,950.00	0.00	3,550.00
8. TOTAL VOLUNTEER SUPPORT EXPENSES				
SECTION TOTALS	17,392.00	36,179.77	143,540.92	197,112.69

Category	Funding Source			TOTAL BUDGETED
	FEDERAL	STATE	LOCAL	
B. Volunteer Expenses				
1. VOLUNTEER PERSONNEL EXPENSE--STIPENDS (1,044 x \$4.00 per hour = Annual Budget per VSY)				
Corporation Funded 4 x \$4,176	16,704.00			16,704.00
State Funded (Total FGP VSYs 10 x \$4,176.00 (1,044x\$4.00))		41,760.00		41,760.00
Local Funded			0.00	0.00
Category Total	16,704.00	41,760.00	0.00	58,464.00
2. VOLUNTEER FRINGE BENEFITS (Item Description and cost calculations. Include formula used to calculate.)				
Meals. Reimbursement to volunteers for school lunch. 600 meals @1.50 each.		900.00		900.00
Insurance. Liability for CIMA.		202.00		202.00
				0.00
				0.00
Category Total	0.00	1,102.00	0.00	1,102.00
3. VOLUNTEER TRAVEL (Item description and cost calculations. Include formula used to calculate)				
Volunteer Mileage. Travel to school. .45 per mile, 120 miles max per week per volunteer, varies on volunteer le, driver non-driver (uses transportation) 1091.93 miles/month	1,262.00	4,634.40		5,896.40
				0.00
				0.00
Category Total	1,262.00	4,634.40	0.00	5,896.40
4. VOLUNTEER EQUIPMENT (Item/purpose, quantity, cost)				
				0.00
				0.00
Category Total	0.00	0.00	0.00	0.00
5. VOLUNTEER SUPPLIES (Item, purpose, calculation)				
				0.00
				0.00
				0.00
				0.00
Category Total	0.00	0.00	0.00	0.00
6. VOLUNTEER CONTRACTUAL SERVICES (Purpose, contracted cost)				
				0.00
				0.00
Category Total	0.00	0.00	0.00	0.00
7. OTHER VOLUNTEER COSTS (Item description, purpose, formula used to calculate)				
Recognition 18 * \$80. Annual Banquet and 2 small items per year.	80.00	1,360.00		1,440.00
Volunteer Uniforms 18 * \$75 for a jacket, sweatshirt or t-shirt	75.00	1,275.00		1,350.00
Meals for volunteers and staff at Conference on Aging 15x\$15		225.00		225.00
Volunteer Conference on Aging Lodging. 9 rooms @ 185.78		1,672.00		1,672.00
				0.00
Category Total	155.00	4,532.00	0.00	4,687.00
8. TOTAL VOLUNTEER EXPENSES				
SECTION TOTALS	18,121.00	52,028.40	0.00	70,149.40

	FEDERAL	STATE	LOCAL	TOTAL
SECTION A	17,392.00	36,179.77	143,540.92	197,112.69
SECTION B	18,121.00	52,028.40	0.00	70,149.40
GRAND TOTAL	35,513.00	88,208.17	143,540.92	267,262.09

VOLUNTEER PROGRAM BUDGET

PROGRAM NAME: City of Santa Fe Division of Senior Service:

PROGRAM: (check one)

FGP: SCP: RSVP:

FY24

Category	Funding Source			TOTAL BUDGETED
	FEDERAL	STATE	LOCAL	
A. Volunteer Support Expenses				
1. GRANTEE PERSONNEL EXPENSES (Position/Title, Quantity, Annual Salary, % time)				
SCP/FGP Program Manager		8,663.88	21,240.20	29,904.08
\$74,760.19 @ 40%				0.00
SCP/FGP Project Administrator				0.00
\$61,777 @ 20%		8,663.88	3,571.56	12,235.44
SCP/FGP Van Driver				0.00
\$38,309.93 @ 25%		8,663.87	913.61	9,577.48
Category Total	0.00	25,991.63	25,725.37	51,717.00
2. GRANTEE FRINGE BENEFITS (Item Description)				
FICA/Medicare for three staff @ 7.65% Total of \$3,956.35		1,479.00	2,477.35	3,956.35
Employee Insurance (negotiated cost with Cigna).		5,498.00	4,453.14	9,951.14
PERA for three employees @ 20.7875%. 922 per month		4,607.00	6,596.19	11,203.19
Dental insurance for three employees. 45 per month x 12		68.00	437.65	505.65
NM Retiree Health for three employees. \$88.73 per month		600.00	434.34	1,034.34
Worker's Comp for three employees. 29.75 per month x 12		100.00	325.81	425.81
				0.00
				0.00
Category Total	0.00	12,352.00	14,724.48	27,076.48
3. GRANTEE STAFF TRAVEL (Purpose-Expense Calculation) Indicate mileage reimbursement rates.				
In State Gas and Auto Maintenance. 778 x .45 per mile		350.00		350.00
Out of State - One program staff to attend National Conference. Meals/Lodging \$1,050. Transportation \$700.00				0.00
				0.00
Category Total	0.00	350.00	0.00	350.00
4. GRANTEE EQUIPMENT (Item/purpose, quantity, estimated total cost)				
Office Supplies. Printers, toners, binder clips, paper, pens, calendars, labels, etc. 108 per month x 12 months		1,300.00		1,300.00
Operating Supplies. Volunteer and inservice training projects		1,200.00		1,200.00
Gloves, trash bags, vests, tupperware, paper goods, etc. \$100 per month X 12 mths.				0.00
Category Total	0.00	2,500.00	0.00	2,500.00
5. GRANTEE SUPPLIES (Item, estimated total cost)				
				0.00
				0.00
				0.00
Category Total	0.00	0.00	0.00	0.00
6. GRANTEE CONTRACTUAL SERVICES (Purpose, total contracted cost)				
Volunteer software		350.00		350.00
Staff uniform \$700 mandated per union. One employee Project Administrator		700.00		700.00
Background Check Field Print, True Screen 35.25 x 8		282.00		282.00
				0.00
Category Total	0.00	1,332.00	0.00	1,332.00
7. OTHER GRANTEE COSTS (Purpose, actual/estimated total cost)				
Recruitment. 1000 for Outreach materials and 1000 advertising		2,000.00		2,000.00
Food for In-Service Trainings. 101.34 per month x 12 months		1,216.00		1,216.00
Registration for volunteers and staff to attend Conference on Aging 15@\$10.00		150.00		150.00
Category Total	0.00	3,366.00		3,366.00
8. TOTAL VOLUNTEER SUPPORT EXPENSES				
SECTION TOTALS	0.00	45,891.63	40,449.85	86,341.48

Category	Funding Source			TOTAL BUDGETED
	FEDERAL	STATE	LOCAL	
B Volunteer Expenses				
1. VOLUNTEER PERSONNEL EXPENSE--STIPENDS (1,044 x \$4.00 per hour = Annual Budget per VSY)				
Corporation Funded	0.00			0.00
State Funded (Total SCP VSYs 18 x \$4,176.00 (1,044x\$4.00)		75,168.00		75,168.00
Local Funded			0.00	0.00
Category Total	0.00	75,168.00	0.00	75,168.00
2. VOLUNTEER FRINGE BENEFITS (Item Description and cost calculations. Include formula used to calculate.)				
Volunteer Meals. 200@ 1.50		300.00		300.00
Insurance. Liability Insurance CIMA		202.00		202.00
Category Total	0.00	502.00	0.00	502.00
3. VOLUNTEER TRAVEL (Item description and cost calculations. Include formula used to calculate)				
Volunteer Mileage. Travel to school. .45 per mile, 120 miles max per week per volunteer, varies on volunteer ie, driver non-driver (uses transportation) 7567 miles/month		39,187.74		39,187.74
				0.00
				0.00
Category Total	0.00	39,187.74	0.00	39,187.74
4. VOLUNTEER EQUIPMENT (Item/purpose, quantity, cost)				
				0.00
				0.00
Category Total	0.00	0.00	0.00	0.00
5. VOLUNTEER SUPPLIES (Item, purpose, calculation)				
				0.00
				0.00
				0.00
				0.00
Category Total	0.00	0.00	0.00	0.00
6. VOLUNTEER CONTRACTUAL SERVICES (Purpose, contracted cost)				
				0.00
				0.00
Category Total	0.00	0.00	0.00	0.00
7. OTHER VOLUNTEER COSTS (Item description, purpose, formula used to calculate)				
Recognition 26 * \$80. Annual Banquet and 2 small items per year.		2,080.00		2,080.00
Volunteer Uniforms 26*75 for a jacket, sweatshirt or t-shirt		1,950.00		1,950.00
Meals for volunteers and staff at Conference on Aging 15x\$15		225.00		225.00
Volunteer Conference on Aging Lodging. 7 rooms @ 185.78		1,300.46		1,300.46
				0.00
Category Total	0.00	5,555.46	0.00	5,555.46
8. TOTAL VOLUNTEER/EXPENSES				
SECTION TOTALS	0.00	120,413.20	0.00	120,413.20

	FEDERAL	STATE	LOCAL	TOTAL
SECTION A	0.00	45,891.63	40,449.85	86,341.48
SECTION B	0.00	120,413.20	0.00	120,413.20
GRAND TOTAL	0.00	166,304.83	40,449.85	206,754.68

VOLUNTEER PROGRAM BUDGET

PROGRAM NAME: City of Santa Fe Division of Senlc

PROGRAM: (check one)

 FGP:

 SCP:

 RSVP:

FY24

Category	Funding Source			TOTAL BUDGETED
	FEDERAL (9 mos)	STATE (12 mos)	LOCAL (12 mos)	
A. Volunteer Support Expenses				
1. GRANTEE PERSONNEL EXPENSES (Position/Title, Quantity, Annual Salary, % time)				
Program Administrator: 1 staff @ \$53,356.49 100%	7,033.00	15,091.00	28,888.49	51,012.49
usage				0.00
Program Coordinator: 1 staff @ \$42,234.84 100%	10,434.00	6,588.00	21,734.84	38,756.84
usage				0.00
				0.00
Category Total	17,467.00	21,679.00	50,623.33	89,769.33
2. GRANTEE FRINGE BENEFITS (Item Description)				
FICA (SS & Medicare)- Salary of 2 staff (\$87,006.40) @ 7	365.00	2,660.00	4,166.74	7,191.74
Health Insurance - 2 staff- Total of 2096.58 x 12 mths	3,804.00	5,000.00	15,087.28	23,891.28
PERA Retirement - Salary of 2 staff @20.78%	428.00	2,874.00	17,263.47	20,565.47
Dental Insurance -2 staff- Total of 92.84 x 12 months	120.00	272.00	682.10	1,074.10
NM Retiree Health - 2 staff \$145 x 12 months	229.00	707.00	899.83	1,835.83
Worker's Comp - 2 staff \$11.66 x 12 months	38.00	90.00	1,130.10	1,258.10
				0.00
				0.00
				0.00
Category Total	4,984.00	11,603.00	39,229.52	55,816.52
3. GRANTEE STAFF TRAVEL (Purpose-Expense Calculation) Indicate mileage reimbursement rates.				
Local Travel staff visit vol stations 1,320 miles x \$0.45	445.50			445.50
National Conf -2 staff x Transportation \$600				0.00
Meals/Lodging \$700 Other travel \$200				0.00
				0.00
Category Total	445.50	0.00	0.00	445.50
4. GRANTEE EQUIPMENT (Item/purpose, quantity, estimated total cost)				
				0.00
				0.00
				0.00
Category Total	0.00	0.00	0.00	0.00
5. GRANTEE SUPPLIES (Item, estimated total cost)				
Office Supplies -furniture,print cartridges, paper, etc. \$50/mo x 12 mo	168.75	375.00		543.75
Operating Supplies.volunteer training and outreach service projects. Gloves, trash bags, vests, tupperware, paper goods, etc. 50.00 per month x 12 months.	224.25	301.00		525.25
				0.00
Category Total	393.00	676.00	0.00	1,069.00
6. GRANTEE CONTRACTUAL SERVICES (Purpose, total contracted cost)				
Criminal Background Checks \$35.25 x 7 checks	80.00	139.75		219.75
Staff Uniforms - 1 staff @ \$700 ea. Per Union Contract		700.00		700.00
Volunteer Reporter Software		100.00		100.00
				0.00
Category Total	80.00	939.75	0.00	1,019.75
7. OTHER GRANTEE COSTS (Purpose, actual/estimated total cost)				
Advertising- Recruit Ads- Print \$233.30x 6 ads	826.35	298.00		1,124.35
Advertising - radio \$125 per month x 12	1,125.00			1,125.00
Postcards- design, print, mail \$900	675.00			675.00
Volunteer Recruitment Outreach Materials 200@ 1.00		200.00		200.00
Category Total	2,626.35	498.00	0.00	3,124.35
8. TOTAL VOLUNTEER SUPPORT EXPENSES				
SECTION TOTALS	25,995.85	35,395.75	89,852.85	151,244.45

Category	Funding Source			TOTAL BUDGETED
	FEDERAL (9 mos)	STATE 12 Mos	LOCAL (9 mos)	
B. Volunteer Expenses				
1. VOLUNTEER PERSONNEL EXPENSE--STIPENDS (Item, number, annual stipend)				
				0.00
				0.00
				0.00
Category Total	0.00	0.00	0.00	0.00
2. VOLUNTEER FRINGE BENEFITS (Item Description and cost calculations. Include formula used to calculate.)				
Insurance CIMA Accident 400 vols @ \$4.37; Liability 400 @ \$1.30 Auto liability 331 @ \$5.90 + NM Surplus Tax.	1,625.25	2,054.00		3,679.25
				0.00
				0.00
Category Total	1,625.25	2,054.00	0.00	3,679.25
3. VOLUNTEER TRAVEL (Item description and cost calculations. Include formula used to calculate)				
Volunteer mileage reimbursement based on program mileage policy (rate \$0.45/mile x 48,175.09 miles)	7,002.40	12,342.25		19,344.65
				0.00
Category Total	7,002.40	12,342.25	0.00	19,344.65
4. VOLUNTEER EQUIPMENT (Item/purpose, quantity, cost)				
				0.00
				0.00
Category Total	0.00	0.00	0.00	0.00
5. VOLUNTEER SUPPLIES (Item, purpose, calculation)				
				0.00
				0.00
Category Total	0.00	0.00	0.00	0.00
6. VOLUNTEER CONTRACTUAL SERVICES (Purpose, contracted cost)				
				0.00
				0.00
Category Total	0.00	0.00	0.00	0.00
7. OTHER VOLUNTEER COSTS (Item description, purpose, formula used to calculate)				
50 Fed volunteers, 59 State volunteers + 91 = 200. Volunteer Recognition 200 vols @ \$55.00 each Gifts, Events, Gift Cards, etc	2,662.50	7,450.00		10,112.50
Guest Speaker/Entertainment for Volunteer Recognition (May)				0.00
Vol. Education (Optional AARP Smart Driver Class) 25 AARP Member at \$20. 10 Non-Members @ \$25	214.00	465.00		679.00
Volunteer meals NM Conference on Aging 30x10 x 2 days		600.00		600.00
Conference on Aging Registration 30x10		300.00		300.00
Category Total	2,876.50	8,815.00	0.00	11,691.50
8. TOTAL VOLUNTEER EXPENSES				
SECTION TOTALS	11,504.15	23,211.25	0.00	34,715.40
	FEDERAL	STATE	LOCAL	TOTAL
SECTION A	25,995.85	35,395.75	89,852.85	151,244.45
SECTION B	11,504.15	23,211.25	0.00	34,715.40
GRAND TOTAL	37,500.00	58,607.00	89,852.85	185,959.85

43,955.25

67,389.64



City of Santa Fe, New Mexico

Memorandum



DATE: August 24, 2023

TO: Quality of Life Committee
Finance Committee
Governing Body

VIA: Kyra Ochoa, Community Health and Safety Director ^{KO}
Maria Sanchez Tucker, Community Services Director ^{MT}
Manuel Sanchez, Division of Senior Services Director ^{MS}

FROM: Theresa Trujillo, Program Manager TT

ITEM AND ISSUE:

Request for the Approval of Fiscal Year 2024 State of New Mexico Aging and Long Term Services Department Grant Contract #24-624-4000-0024 in the Total Amount of \$313,120.00 for the Foster Grandparent, Senior Companion and Retired Senior Volunteer Programs, Term Ending June 30, 2024; Theresa Trujillo, Volunteer Program Manager ttrujillo@santafenm.gov, 505-955-4745.

BACKGROUND AND SUMMARY:

The Senior Services Department is requesting the approval of the State of New Mexico Aging and Long-Term Services Department Grant Agreement for the Senior Volunteer Programs. The Grant Award is for the Foster Grandparent, Senior Companion and Retired Senior Volunteer Programs. The attached Intergovernmental Agreement reflects the Fiscal Year 2024 awarded appropriations for all three volunteer Programs. The allocations are as follows; Foster Grandparent Program \$88,208.17, Senior Companion Program, \$166,304.83, and the Retired Senior Volunteer Program \$58,607.00.

Our Foster Grandparent program provides opportunities for our senior volunteers to assist children (with special or exceptional needs) in classrooms or Head starts. Then Senior Companion Program arranges for active seniors to visit and assist frail, homebound elderly clients in their homes helping them avoid expensive institutionalization. Our Retired Senior Volunteer Program recruits and provides meaningful volunteer opportunities for senior volunteers to help others by sharing their experience, knowledge and efforts. RSVP volunteers work in food distribution sites, soup kitchens, hospitals, libraries, senior centers, shelters, etc.

CONTRACT NUMBER:

The FY24 Munis contract number is
Project Ledger #'s- (FGP) COM2424101, (RSVP) COM2424104, (SCP) COM2424103

FUNDING SOURCE:

The funding source is:
Fund Name/Number: Senior Citizens Grant/Fund 241
Munis Org Name/Number: Senior Volunteer Programs/2410116
Munis Object Name/Number: .AoA State of New Mexico - 490240 (revenue)/TBD (expenses)

ACTION REQUESTED:

The Community Health and Safety Department respectfully requests your review and approval.

Log # (Finance use only):	
Journal # (Finance use only):	

City of Santa Fe, New Mexico BUDGET AMENDMENT RESOLUTION (BAR)

DEPARTMENT / DIVISION NAME Community Health and Safety/Senior Services					DATE 9/18/2023	
ITEM DESCRIPTION	ORG	OBJECT	PROJECT	INCREASE	DECREASE	
				<i>(enter as positive #)</i>	<i>(enter as negative #)</i>	
Operating Supplies	2410116	530200	COM2424104	340.00		
Food	2410116	530400	COM2424103	616.00		
Uniform Clothing & Linen	2410116	530500	COM2424101	1,100.00		
Software Subscriptions	2410116	530710	COM2424104	44.00		
Gasoline	2410116	531000	COM2424101	350.00		
Gasoline	2410116	531000	COM2424103	350.00		
Gasoline	2410116	531000	COM2424104	446.00		
Misc. Insurance Prem	2410116	555860	COM2424104	642.00		
In State Per Diem	2410116	560250	COM2424103	922.00		
In State Transportation	2410116	560550	COM2424103	23,417.00		
Advertising	2410116	561850	COM2424104	2,924.00		
Recognition	2410116	562850	COM2424104	2,133.00		
Recruitment	2410116	562900	COM2424103	499.00		
Stipends	2410116	562975	COM2424103			(24,863)
REVENUES				<i>(enter as negative #)</i>	<i>(enter as positive #)</i>	
NM Agency on Aging	2410116	490240	COM2424101	(1,450)		
NM Agency on Aging	2410116	490240	COM2424103	(1,141)		
NM Agency on Aging	2410116	490240	COM2424104	(6,529)		
JUSTIFICATION: <i>(use additional page if needed)</i> <i>-Attach supporting documentation/memo</i>				\$ 24,863	\$ (24,863)	

New Mexico Aging and Long Term Services Senior Volunteer Programs increase and object funding corrections/adjustment.	<i>(Complete section below if BAR results in a net change to ANY Fund)</i>	
	Fund(s) Affected	Fund Balance Increase/(Decrease)
	TOTAL:	0

Manuel Sanchez Prepared By (print name)	9/18/2023 Date	(Use this form for Finance Committee/ City Council agenda items ONLY)	Andy Hopkins Budget Officer	Date
 Maria Tucker Division Director Signature (optional)	9/22/23 Date	CITY COUNCIL APPROVAL	Emily K Oster Finance Director (s \$5,000)	Sep 29, 2023 Date
Department Director Signature	Date	City Council Approval Date	City Manager (s \$60,000)	Date



CITY OF SANTA FE PROCUREMENT CHECKLIST

Contractor Name: State of New Mexico Aging and Long Term Services Department

Procurement Title: INTERGOVERNMENTAL AGREEMENT #24-624-4000-0024 (FGP,SCP,RSVP)

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 H & S/Seniors Staff Name Theresa Trujillo

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 checked="" type="checkbox"/> | Contractors Exempt Letter |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Purchasing Officers approval for exempt procurement |
| <input checked="" type="checkbox"/> | <input 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 checked="" 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 type="checkbox"/> | <input checked="" type="checkbox"/> | Certificate of Insurance |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | All documentation presented to Committees |
| <input type="checkbox"/> | <input type="checkbox"/> | Other: |

<u>Theresa Trujillo</u>	Program Manager	07/05/2023
Department Rep Printed Name (attesting that all information included)	Title	Date
	CPO	Sep 29, 2023
Purchasing Officer (attesting that all information is reviewed)	Title	Date
ITT Representative (attesting that all information is reviewed)	Title	Date

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



City of Santa Fe

Summary of Contract, Agreement, Amendment & Lease

All applicable fields to be completed by department (complete 1.b only if you are processing an amendment):

1.a Munis Contract: _____ Procurement # (RFP/ITB# If any): _____

Contractor: State of New Mexico Aging & Long-Term Services Department

Procurement Method: Small Purchase RFP ITB Sole Source GSA Cooperative Exempt

Description/Title: Administer the Senior Volunteer Programs - Foster Grandparent Program, Senior Companion Program, Retired Senior Volunteer Program

Contract: Agreement: Lease/Rent: Amendment:

Term Start Date: 07/01/2023 Term End Date: 06/30/2024 Total Contract Amount: \$313,120.00

Approved by Council (if over the City Manager's approval threshold, you must go through GB) _____

Contract / Lease: ALTSD Intergovernmental Agreement #24-624-4000-0024

1.b Amendment #: _____ to the Original Contract/Lease # _____

Increase/(Decrease) Amount \$: _____

Extend Expiration Date to: _____

Approved by Council (if the original went through GB, all amendments must go through GB regardless of the amendment reason) Date: _____

Amendment is for: _____

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

The City of Santa Fe Division of Senior Services has been receiving grant funds from the State of New Mexico for over 20 years to administer the Senior Volunteer Programs.

3. Procurement History: _____

Purchasing Officer Review: _____

Sep 29, 2023

Date: _____

Comment & Exceptions: _____

4. Funding Source: NM AoA - 490240

Org / Object: 2410116/Various

Andy Hopkins

Sep 28, 2023

Budget Officer Approval: _____

Date: _____

Comment & Exceptions: _____

5. Grant History (if applicable): _____

Grants Administrator Approval: Cheryl Kinnes

Date Sep 29, 2023

Staff Contact who Completed This Form: Theresa Trujillo

Phone #: 505-955-4745

To be recorded by City Clerk: _____

Email: ttrujillo@santafenm.gov

Clerk # _____

Date of Execution: _____

ITT Representative (attesting that all information is reviewed)

Title

Date



City of Santa Fe New Mexico

Finance Department

Project Ledger Request Form



Date of Request: 07/05/2023

Project Title: FOSTER GRANDPARENT PROGRAM (FGP)

Project Type: CIP Grant Internal Tracking

Department: COM.H & S SRS. 100/241 Project Manager: THERESA TRUJILLO Ext: 4745

Project Date Range: 07/01/2023 to 06/30/2024 Create Fixed Asset

Project ID: <u>COM2424101</u>
Grant ID: <u>F2402/S2406</u>
Approved By: <u>BSG/ [Signature]</u>
(Finance Use Only)

Multi-Funding (complete all funding sources, should equal 100%)

Funding Source: STATE: ALTSD GRANT AGREEMENT NM AOA % of Funding: 33%

MUNIS ORG: 2410116 MUNIS OBJ: 490240 Awarded Amount: \$88,208.17

Funding Source: FEDERAL CORPORATION FOR NATIONAL & COMMUNITY SERVICE UJA HSS % of Funding: 13.3%

MUNIS ORG: 2410116 MUNIS OBJ: 490510 Awarded Amount: \$35,513.00

Expense String Phase: LOCAL:\$143,540.92 MUNIS ORG 2410116 TOTAL:\$267,262.09 % OF FUND 53.7%
A project must have at least one phase identified, this can be used as an additional level of tracking, for example, CIP - Design, Construction, etc. For Grants can be used as reimbursable types, such as transportation, salaries.

(You can create more than one phase and you can default MUNIS ORGs and OBJs, optional)

Phase: SEE ATTACHED SHEET MUNIS ORG: 2410116 MUNIS OBJ: _____

Grants Only (list all grants if applicable):

Grantor Name: STATE-ALTSD I-G AGREE. 24-624-4000-0024 Awarded Amount: \$313,120.00

AR Charge Code: 2410116.490240 Grant funds multiple projects
(Complete a form for each project)

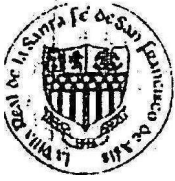
Grantor Id: ST. IGA 24-624-4000-0024 Federal CFDA (if applicable): 94.011

Grantor Name: FEDERAL-CNCS 23SRDNM0022 Awarded Amount: \$35,513.00

AR Charge Code: 2410116.490510 Grant funds multiple projects
(Complete a form for each project)

Grantor Id: FED: AN 23SRDNM002 Federal CFDA (if applicable): 94.011

(If grants please provide all grant award documents with form) Attached Grant Documentation



City of Santa Fe New Mexico

Finance Department

Project Ledger Request Form



Date of Request: 07/05/2023

Project Title: SENIOR COMPANION PROGRAM (SCP)

Project Type: CIP Grant Internal Tracking

Department: COM.H & S SRS. 100/241 Project Manager: THERESA TRUJILLO Ext: 4745

Project Date Range: 07/01/2023 to 06/30/2024 Create Fixed Asset

Project ID: <u>COM2424103</u>
Grant ID: <u>S2406</u>
Approved By: <u>BSG [Signature]</u>
(Finance Use Only)

Multi-Funding (complete all funding sources, should equal 100%)

Funding Source: STATE:ALTSD GRANT AGREEMENT % of Funding: 80.4%

MUNIS ORG: 2410116 MUNIS OBJ: 490240 Awarded Amount: \$166,304.83

Funding Source: LOCAL % of Funding: 19.6%

MUNIS ORG: 2410116 MUNIS OBJ: _____ Awarded Amount: \$40,449.85

Expense String Phase: TOTAL:\$206,754.68

A project must have at least one phase identified, this can be used as an additional level of tracking, for example, CIP - Design, Construction, etc. For Grants can be used as reimbursable types, such as transportation, salaries.

(You can create more than one phase and you can default MUNIS ORGs and OBJs, optional)

Phase: SEE ATTACHED SHEET MUNIS ORG: 2410116 MUNIS OBJ: SEE ATTACHED SHEET

Grants Only (list all grants if applicable):

Grantor Name: STATE:ALTSD I-G AGREE.24-624-4000-0024 Awarded Amount: \$313,120.00

AR Charge Code: 2410116.490240 Grant funds multiple projects
(Complete a form for each project)

Grantor Id: ST: IGA 24-624-4000-0024 Federal CFDA (if applicable): _____

Grantor Name: _____ Awarded Amount: _____

AR Charge Code: _____ Grant funds multiple projects
(Complete a form for each project)

Grantor Id: _____ Federal CFDA (if applicable): _____

(If grants please provide all grant award documents with form) Attached Grant Documentation



City of Santa Fe New Mexico

Finance Department

Project Ledger Request Form



Date of Request: 07/05/2023

Project Title: RETIRED SENIOR VOLUNTEER PROGRAM (RSVP)

Project Type: CIP Grant Internal Tracking

Department: COM.H & S SRS. 100/241 Project Manager: THERESA TRUJILLO Ext: 4745

Project Date Range: 07/01/2023 to 06/30/2024 Create Fixed Asset

Project ID: <u>COM2424104</u>
Grant ID: <u>F2403/S2406</u>
Approved By: <u>BSG/CT</u> (Finance Use Only)

Multi-Funding (complete all funding sources, should equal 100%)

Funding Source: STATE:ALTS D GRANT AGREEMENT NMAOA % of Funding: 31.5%

MUNIS ORG: 2410116 MUNIS OBJ: 490240 Awarded Amount: \$58,607.00

Funding Source: FEDERAL:CORPORATION FOR NATINAL & COMMUNITY SERVICE UUS HSS % of Funding: 20.2%

MUNIS ORG: 2410116 MUNIS OBJ: 490510 Awarded Amount: \$37,500.00 JULY23-MAR23

Expense String Phase: LOCAL:\$89,852.85 MUNIS ORG: 2410116 TOTAL:\$185,959.85 % OF FUND 48.3%

A project must have at least one phase identified, this can be used as an additional level of tracking, for example, CIP - Design, Construction, etc. For Grants can be used as reimbursable types, such as transportation, salaries.

(You can create more than one phase and you can default MUNIS ORGs and OBJs, optional)

Phase: SEE ATTACHED MUNIS ORG: 2410116 MUNIS OBJ: SEE ATTACHED SHEET

Grants Only (list all grants if applicable):

Grantor Name: STATE:ALTS D I-G AGREE. 24-624-4000-0024 Awarded Amount: \$313,120.00

AR Charge Code: 2410116.490240 Grant funds multiple projects
(Complete a form for each project)

Grantor Id: AT: IG 24-624-4000-0024 Federal CFDA (if applicable): 94.002

Grantor Name: FEDERAL-CNCS 23SRDNM003 Awarded Amount: \$37,500.00

AR Charge Code: 2410116.490510 Grant funds multiple projects
(Complete a form for each project)

Grantor Id: FED A# 23SRDNM003 Federal CFDA (if applicable): 94.002

(If grants please provide all grant award documents with form) Attached Grant Documentation

Signature: Theresa Trujillo
Theresa Trujillo (Sep 25, 2023 11:50 MDT)

Email: tptrujillo@santafenm.gov

Signature: Kyra Ochoa
Kyra Ochoa (Sep 27, 2023 13:52 MDT)

Email: krochoa@santafenm.gov












FY24 Volunteer Programs State Grant Awards

Final Audit Report

2023-09-27

Created:	2023-09-25
By:	Justin Gonzales (jmgonzales@santafenm.gov)
Status:	Signed
Transaction ID:	CBJCHBCAABAA_cePp24Cot3dBgcH-H8_hVGALe3dibel

"FY24 Volunteer Programs State Grant Awards" History

-  Document created by Justin Gonzales (jmgonzales@santafenm.gov)
2023-09-25 - 5:39:13 PM GMT
-  Document emailed to Theresa Trujillo (ptrujillo@santafenm.gov) for signature
2023-09-25 - 5:41:21 PM GMT
-  Email viewed by Theresa Trujillo (ptrujillo@santafenm.gov)
2023-09-25 - 5:49:43 PM GMT
-  Document e-signed by Theresa Trujillo (ptrujillo@santafenm.gov)
Signature Date: 2023-09-25 - 5:50:31 PM GMT - Time Source: server
-  Document emailed to Andy Hopkins (ajhopkins@santafenm.gov) for signature
2023-09-25 - 5:50:33 PM GMT
-  Email viewed by Andy Hopkins (ajhopkins@santafenm.gov)
2023-09-25 - 6:35:56 PM GMT
-  Document e-signed by Andy Hopkins (ajhopkins@santafenm.gov)
Signature Date: 2023-09-25 - 6:36:13 PM GMT - Time Source: server
-  Document emailed to Maria Tucker (metucker@santafenm.gov) for signature
2023-09-25 - 6:36:15 PM GMT
-  Email viewed by Maria Tucker (metucker@santafenm.gov)
2023-09-25 - 6:36:24 PM GMT
-  Document e-signed by Maria Tucker (metucker@santafenm.gov)
Signature Date: 2023-09-25 - 6:36:55 PM GMT - Time Source: server
-  Document emailed to krochoa@santafenm.gov for signature
2023-09-25 - 6:36:56 PM GMT




 Document shared with mpfinley@santafenm.gov by Justin Gonzales (jmgonzales@santafenm.gov)


2023-09-25 - 9:23:14 PM GMT

 Email viewed by krochoa@santafenm.gov

2023-09-27 - 7:52:04 PM GMT

 Signer krochoa@santafenm.gov entered name at signing as Kyra Ochoa

2023-09-27 - 7:52:31 PM GMT

 Document e-signed by Kyra Ochoa (krochoa@santafenm.gov)

Signature Date: 2023-09-27 - 7:52:33 PM GMT - Time Source: server

 Agreement completed.

2023-09-27 - 7:52:33 PM GMT













FY24 Volunteer Programs State Grant Awards (1)

Final Audit Report

2023-09-29

Created:	2023-09-28
By:	Kristy Miera (kamiera@santafenm.gov)
Status:	Signed
Transaction ID:	CBJCHBCAABAAQPc-0fE2CvXwdZYDMPFIZYQ1XHwBveuZ

"FY24 Volunteer Programs State Grant Awards (1)" History

-  Document created by Kristy Miera (kamiera@santafenm.gov)
2023-09-28 - 7:08:56 PM GMT
-  Document emailed to Andy Hopkins (ajhopkins@santafenm.gov) for signature
2023-09-28 - 7:13:53 PM GMT
-  Email viewed by Andy Hopkins (ajhopkins@santafenm.gov)
2023-09-28 - 7:55:50 PM GMT
-  Document e-signed by Andy Hopkins (ajhopkins@santafenm.gov)
Signature Date: 2023-09-28 - 8:03:01 PM GMT - Time Source: server
-  Document emailed to cajames@santafenm.gov for signature
2023-09-28 - 8:03:03 PM GMT
-  Email viewed by cajames@santafenm.gov
2023-09-28 - 8:59:11 PM GMT
-  Signer cajames@santafenm.gov entered name at signing as Cheryl James
2023-09-29 - 7:35:13 PM GMT
-  Document e-signed by Cheryl James (cajames@santafenm.gov)
Signature Date: 2023-09-29 - 7:35:15 PM GMT - Time Source: server
-  Document emailed to Travis Dutton-Leyda (tkduttonleyda@santafenm.gov) for signature
2023-09-29 - 7:35:16 PM GMT
-  Email viewed by Travis Dutton-Leyda (tkduttonleyda@santafenm.gov)
2023-09-29 - 7:40:49 PM GMT



 Document e-signed by Travis Dutton-Leyda (tkduttonleyda@santafenm.gov)

Signature Date: 2023-09-29 - 7:41:06 PM GMT - Time Source: server

 Document emailed to ekoster@santafenm.gov for signature


2023-09-29 - 7:41:08 PM GMT

 Email viewed by ekoster@santafenm.gov

2023-09-29 - 7:42:02 PM GMT

 Signer ekoster@santafenm.gov entered name at signing as Emily K. Oster

2023-09-29 - 7:45:54 PM GMT

 Document e-signed by Emily K. Oster (ekoster@santafenm.gov)

Signature Date: 2023-09-29 - 7:45:56 PM GMT - Time Source: server

 Agreement completed.

2023-09-29 - 7:45:56 PM GMT














ALTS_Amendment_1_Packet


Final Audit Report

2024-04-12

Created:	2024-04-12
By:	Justin Gonzales (jmgonzales@santafenm.gov)
Status:	Signed
Transaction ID:	CBJCHBCAABAAJ2OkREmAqNmLIVqbBBdUqib1ADwsOs0N

"ALTS_Amendment_1_Packet" History

-  Document created by Justin Gonzales (jmgonzales@santafenm.gov)
2024-04-12 - 8:35:05 PM GMT
-  Document emailed to THERESA TRUJILLO (tptrujillo@santafenm.gov) for signature
2024-04-12 - 8:39:15 PM GMT
-  Email viewed by THERESA TRUJILLO (tptrujillo@santafenm.gov)
2024-04-12 - 8:40:25 PM GMT
-  Signer THERESA TRUJILLO (tptrujillo@santafenm.gov) entered name at signing as Theresa Trujillo
2024-04-12 - 8:40:52 PM GMT
-  Document e-signed by Theresa Trujillo (tptrujillo@santafenm.gov)
Signature Date: 2024-04-12 - 8:40:54 PM GMT - Time Source: server
-  Document emailed to mnsanchez@ci.santa-fe.nm.us for signature
2024-04-12 - 8:40:58 PM GMT
-  Email viewed by mnsanchez@ci.santa-fe.nm.us
2024-04-12 - 9:23:08 PM GMT
-  Signer mnsanchez@ci.santa-fe.nm.us entered name at signing as Manuel Sanchez
2024-04-12 - 9:24:17 PM GMT
-  Document e-signed by Manuel Sanchez (mnsanchez@ci.santa-fe.nm.us)
Signature Date: 2024-04-12 - 9:24:19 PM GMT - Time Source: server
-  Document emailed to Maria Tucker (metucker@ci.santa-fe.nm.us) for signature
2024-04-12 - 9:24:23 PM GMT
-  Email viewed by Maria Tucker (metucker@ci.santa-fe.nm.us)
2024-04-12 - 9:27:28 PM GMT

 Document e-signed by Maria Tucker (metucker@ci.santa-fe.nm.us)

Signature Date: 2024-04-12 - 9:28:10 PM GMT - Time Source: server

 Agreement completed.

2024-04-12 - 9:28:10 PM GMT

URGENT - ALTS_Amendment_1_contract_Packet

Interim Agreement Report









2024-04-24

Created:	2024-04-22
By:	Kristy Miera (kamiera@santafenm.gov)
Status:	Out for Signature
Transaction ID:	CBJCHBCAABAAAdUdogubemXKCOHvtHtPPwiwv54tgY5b6


Agreement History

Agreement history is the list of the events that have impacted the status of the agreement prior to the final signature. A final audit report will be generated when the agreement is complete.


"URGENT - ALTS_Amendment_1_contract_Packet" History

-  Document created by Kristy Miera (kamiera@santafenm.gov)
2024-04-22 - 9:15:23 PM GMT
-  Document emailed to ajhopkins@santafenm.gov ajhopkins@santafenm.gov (ajhopkins@santafenm.gov) for signature
2024-04-22 - 9:36:18 PM GMT
-  Email viewed by ajhopkins@santafenm.gov ajhopkins@santafenm.gov (ajhopkins@santafenm.gov)
2024-04-22 - 10:07:51 PM GMT
-  Document e-signed by ajhopkins@santafenm.gov ajhopkins@santafenm.gov (ajhopkins@santafenm.gov)
Signature Date: 2024-04-22 - 10:09:14 PM GMT - Time Source: server
-  Document sent to Cathy Thompson (cmthompson@santafenm.gov) and mtbonifer@santafenm.gov for signature. One of them to sign
2024-04-22 - 10:09:20 PM GMT
-  Email viewed by Cathy Thompson (cmthompson@santafenm.gov)
2024-04-22 - 10:11:04 PM GMT
-  Signer Cathy Thompson (cmthompson@santafenm.gov) entered name at signing as Cathy M. Thompson
2024-04-22 - 10:15:28 PM GMT
-  Document e-signed by Cathy M. Thompson (cmthompson@santafenm.gov)
Signature Date: 2024-04-22 - 10:15:30 PM GMT - Time Source: server



 Document sent to JoAnn Lovato (jdlovato@santafenm.gov) and Travis Dutton-Leyda (tkduttonleyda@santafenm.gov) for signature. One of them to sign

2024-04-22 - 10:15:35 PM GMT

 Email viewed by JoAnn Lovato (jdlovato@santafenm.gov)

2024-04-22 - 10:16:34 PM GMT

 Email viewed by Travis Dutton-Leyda (tkduttonleyda@santafenm.gov)

2024-04-22 - 10:31:36 PM GMT






URGENT - ALTS_Amendment_1_contract_Packet (1)

Final Audit Report

2024-04-25

Created:	2024-04-24
By:	Kristy Miera (kamiera@santafenm.gov)
Status:	Signed
Transaction ID:	CBJCHBCAABAAUj-JQnAgZTazGV52muDOA-QpW6u8UFBr

"URGENT - ALTS_Amendment_1_contract_Packet (1)" History

-  Document created by Kristy Miera (kamiera@santafenm.gov)
2024-04-24 - 6:02:03 PM GMT
-  Document emailed to EMILY OSTER (ekoster@santafenm.gov) for signature
2024-04-24 - 6:14:12 PM GMT
-  Email viewed by EMILY OSTER (ekoster@santafenm.gov)
2024-04-25 - 10:22:33 PM GMT
-  Document e-signed by EMILY OSTER (ekoster@santafenm.gov)
Signature Date: 2024-04-25 - 10:25:42 PM GMT - Time Source: server
-  Agreement completed.
2024-04-25 - 10:25:42 PM GMT












- ALTS_Amendment_1_contract_Packetms1

Final Audit Report


2024-04-26

Created:	2024-04-26
By:	Manuel Sanchez (mnsanchez@santafenm.gov)
Status:	Canceled / Declined
Transaction ID:	CBJCHBCAABAALuTX8VI60RLgzxly8FQI6JITIETL6Nio


"- ALTS_Amendment_1_contract_Packetms1" History

-  Document created by Manuel Sanchez (mnsanchez@santafenm.gov)
2024-04-26 - 9:43:41 PM GMT- IP address: 63.232.20.2
-  Document emailed to THERESA TRUJILLO (ttrujillo@santafenm.gov) for signature
2024-04-26 - 9:49:10 PM GMT
-  Email viewed by THERESA TRUJILLO (ttrujillo@santafenm.gov)
2024-04-26 - 9:49:56 PM GMT- IP address: 104.47.64.254
-  Signer THERESA TRUJILLO (ttrujillo@santafenm.gov) entered name at signing as Theresa Trujillo
2024-04-26 - 9:50:18 PM GMT- IP address: 63.232.20.2
-  Document e-signed by Theresa Trujillo (ttrujillo@santafenm.gov)
Signature Date: 2024-04-26 - 9:50:20 PM GMT - Time Source: server- IP address: 63.232.20.2
-  Document emailed to Manuel Sanchez (mnsanchez@santafenm.gov) for signature
2024-04-26 - 9:50:25 PM GMT
-  Email viewed by Manuel Sanchez (mnsanchez@santafenm.gov)
2024-04-26 - 9:50:43 PM GMT- IP address: 63.232.20.2
-  Document e-signed by Manuel Sanchez (mnsanchez@santafenm.gov)
Signature Date: 2024-04-26 - 9:51:04 PM GMT - Time Source: server- IP address: 63.232.20.2
-  Document emailed to Maria Tucker (metucker@ci.santa-fe.nm.us) for signature
2024-04-26 - 9:51:08 PM GMT
-  Email viewed by Maria Tucker (metucker@ci.santa-fe.nm.us)
2024-04-26 - 9:52:47 PM GMT- IP address: 172.59.0.176
-  Document e-signed by Maria Tucker (metucker@ci.santa-fe.nm.us)
Signature Date: 2024-04-26 - 9:53:12 PM GMT - Time Source: server- IP address: 172.59.0.176




 Document emailed to ajhopkins@santafenm.gov ajhopkins@santafenm.gov (ajhopkins@santafenm.gov) for signature

2024-04-26 - 9:53:17 PM GMT

 Email viewed by ajhopkins@santafenm.gov ajhopkins@santafenm.gov (ajhopkins@santafenm.gov)

2024-04-26 - 10:45:12 PM GMT- IP address: 104.47.64.254

 Document declined by ajhopkins@santafenm.gov ajhopkins@santafenm.gov (ajhopkins@santafenm.gov)

Decline reason: Please remove the \$0.33 cents from the in-state transportation line. we only budget whole dollars. thanks.

2024-04-26 - 10:47:00 PM GMT- IP address: 63.232.20.2






- ALTS_Amendment_1_contract_Packetms2

Final Audit Report

2024-04-26

Created:	2024-04-26
By:	Manuel Sanchez (mnsanchez@santafenm.gov)
Status:	Signed
Transaction ID:	CBJCHBCAABAAmRSiKqketo-mQJc3QT3lybHZKtLhJffH

"- ALTS_Amendment_1_contract_Packetms2" History

-  Document created by Manuel Sanchez (mnsanchez@santafenm.gov)
2024-04-26 - 11:08:51 PM GMT - IP address: 63.232.20.2
-  Document emailed to ajhopkins@santafenm.gov ajhopkins@santafenm.gov (ajhopkins@santafenm.gov) for signature
2024-04-26 - 11:10:29 PM GMT
-  Email viewed by ajhopkins@santafenm.gov ajhopkins@santafenm.gov (ajhopkins@santafenm.gov)
2024-04-26 - 11:11:39 PM GMT - IP address: 104.47.64.254
-  Document e-signed by ajhopkins@santafenm.gov ajhopkins@santafenm.gov (ajhopkins@santafenm.gov)
Signature Date: 2024-04-26 - 11:12:21 PM GMT - Time Source: server- IP address: 63.232.20.2
-  Agreement completed.
2024-04-26 - 11:12:21 PM GMT








24-0324 NM Aging and Log Term Services Department

Final Audit Report

2024-05-09

Created:	2024-05-09
By:	Xavier Vigil (xivigil@ci.santa-fe.nm.us)
Status:	Signed
Transaction ID:	CBJCHBCAABAAsnSCv-RBkh1SONsTEhHKdI2Xlzm2MsTR

"24-0324 NM Aging and Log Term Services Department" History

-  Document created by Xavier Vigil (xivigil@ci.santa-fe.nm.us)
2024-05-09 - 4:32:47 PM GMT- IP address: 63.232.20.2
-  Document emailed to Alan Webber (amwebber@santafenm.gov) for signature
2024-05-09 - 4:34:44 PM GMT
-  Email viewed by Alan Webber (amwebber@santafenm.gov)
2024-05-09 - 4:38:34 PM GMT- IP address: 172.225.108.140
-  Document e-signed by Alan Webber (amwebber@santafenm.gov)
Signature Date: 2024-05-09 - 4:39:02 PM GMT - Time Source: server- IP address: 63.232.20.2
-  Document emailed to GERALYN CARDENAS (gfcardenas@santafenm.gov) for signature
2024-05-09 - 4:39:08 PM GMT
-  Email viewed by GERALYN CARDENAS (gfcardenas@santafenm.gov)
2024-05-09 - 4:46:15 PM GMT- IP address: 174.231.16.209
-  Document e-signed by GERALYN CARDENAS (gfcardenas@santafenm.gov)
Signature Date: 2024-05-09 - 4:46:29 PM GMT - Time Source: server- IP address: 174.231.16.209
-  Agreement completed.
2024-05-09 - 4:46:29 PM GMT