

Henry Roybal
Commissioner, District 1

Anna Hansen
Commissioner, District 2

Rudy N. Garcia
Commissioner, District 3



Anna T. Hamilton
Commissioner, District 4

Hank Hughes
Commissioner, District 5

Katherine Miller
County Manager

February 22, 2022

SANTA FE COUNTY
RFP No. 2022-0135-FIN/APS
FINANCIAL ADVISOR SERVICES

ADDENDUM NO. 1

Dear Proponents,

This addendum is issued to reflect the following immediately. It shall be the responsibility of interested Offerors to adhere to any changes or revisions to the RFP as identified in this Addendum No. 1. This documentation shall become permanent and made part of the departmental files.

Attachment A: Pre-Proposal Agenda & Sign-In Sheet

Please add this Addendum No. 1 to the original proposal documents and refer to proposal documents, hereto as such. This and all subsequent addenda will become part of any resulting contract documents and have effects as if original issued. All other unaffected sections will have their original interpretation and remain in full force and effect. Responders are reminded that any questions or need for clarification must be addressed to Amanda Patterson-Sanchez, Procurement Specialist Senior at apatterson-sanchez@santafecountynm.gov.



**PRE-PROPOSAL CONFERENCE
FINANCIAL ADVISOR SERVICES
RFP NO. 2022-0135-FIN/APS
FEBRUARY 15, 2022 AT 1:30PM**

Contracting Agency: Santa Fe County

- | | | |
|----------------------------|-------------------------------|---------------------|
| • Amanda Patterson-Sanchez | Procurement Specialist Senior | Purchasing Division |
| • Bill Taylor | Procurement Manager | Purchasing Division |
| • Yvonne Herrera | Finance Director | Finance Division |

Project Information

- Santa Fe County Finance Division is requesting proposals for the purpose of procuring professional financial advisor services to include working with the County officials and bond counsel to provide information appropriate to bond rating agencies, conduct a survey of the financial resources of the County to determine the extent of its capacity to authorize, issue and service debt.
- **Request for Proposals (RFP) Documents:** The RFP documents are available by contacting Amanda Patterson-Sanchez at apatterson-sanchez@santafecountynm.gov or visiting the Santa Fe County's website at https://www.santafecountynm.gov/asd/current_bid_solicitations.

Proposal Information

- Carefully read the Request for Proposals for requirements, terms and conditions including the sample agreement.
- Sequence of Events are listed on page 11.
- Proposal Organization – Proposal should be organized as outlined in the RFP on pages 21 and 22.
- Selection of finalist(s) – the most qualified proposal received based on the evaluation factors outlined in the RFP (pages 23-26) will be scored by a three to four-member evaluation committee.

- Preferences –
 1. N.M. In-State Business Preference Certificate, 50 points total of all evaluation factors added to score.

OR
 2. N.M. Resident Veterans Preference Certificate, 100 points total of all evaluation factors added to score. For more information on State Preference visits <https://www.tax.newmexico.gov/>

AND
 3. Santa Fe County Preference Certificate, 50 points of all evaluation factors added to score. For more information on County Preference visit https://www.santafecountynm.gov/finance/purchasing_division
- Please submit all questions via email to Amanda Patterson-Sanchez at apattersonsanchez@santafecountynm.gov. The last day for questions will be **Thursday, February 17, 2022. (Please do not contact any other County staff).**
- Addendum will be issued on **Tuesday, February 22, 2022. (Only question answered by formal written addendum will be binding. Oral and other interpretations or clarifications will be without legal effect).**
- Proposal Submittal –

Due Date: Thursday, March 3, 2022
Time: 2:00PM
Location: 102 Grant Avenue 1st Floor, Santa Fe, NM
Electronic submission also available via Dropbox
utilizing Dropbox link:
<https://www.dropbox.com/request/0oP2jTuEIJ>



SANTA FE COUNTY

**PRE-PROPOSAL CONFERENCE
RFP No. 2022-0135-FIN/APS
FINANCIAL ADVISOR SERVICES
FEBRUARY 15, 2022 AT 1:30PM**

NAME	COMPANY	TELEPHONE	E-MAIL ADDRESS
Amanda Patterson-Sanchez	SFC Purchasing	(505) 992-6753	apatterson-sanchez@santafecountynm.gov
Yvonne Herrera	SFC Finance		
Bill Taylor	SFC Purchasing		
Eric Harrigan	RBC Capital Markets		
Anthony Singh	RBC Capital Markets		