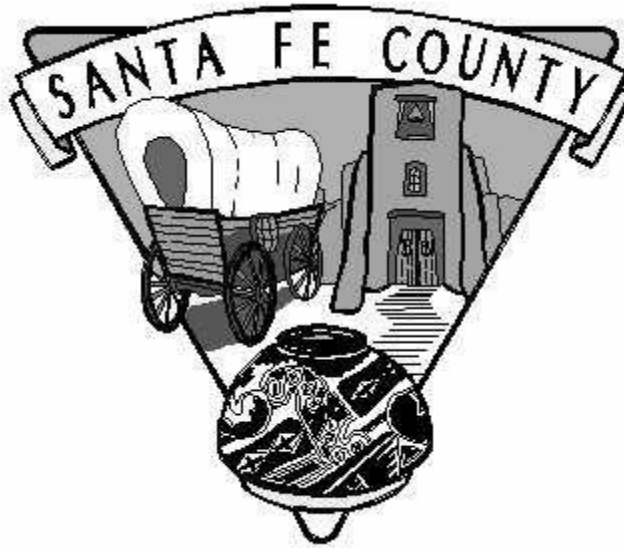


SANTA FE COUNTY
ASSESSOR'S OFFICE
REQUEST FOR PROPOSALS



**PRINTING SERVICES FOR NOTICE OF VALUES
(NOV'S) AND BUSINESS PERSONAL PROPERTY
DECLARATIONS**

RFP# 2017-0092-AO/MM

SEPTEMBER 2016

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I. ADVERTISEMENT

PRINTING SERVICES FOR NOTICE OF VALUES (NOVS) AND BUSINESS PERSONAL PROPERTY DECLARATIONS RFP# 2017-0092-AO/MM

The Santa Fe County Assessor's Office is requesting proposals for the purpose of procuring Printing and Mailing of Notice of Values (NOVs) and Business Personal Property Declarations. All proposals submitted shall be valid for ninety (90) days subject to action by the County. Santa Fe County reserves the right to reject any and all proposals in part or in whole. A completed proposal shall be submitted in a sealed container indicating the proposal title and number along with the Offeror's name and address clearly marked on the outside of the container. **All proposals must be received by 2:00PM on Monday, October 3, 2016 at the Santa Fe County Purchasing Division, 142 W. Palace Avenue (Second Floor), Santa Fe, NM 87501.** By submitting a proposal for the requested services each Offeror is certifying that their proposal complies with regulations and requirements stated within the Request for Proposals.

A **Pre-Proposal Conference** will be held on **Wednesday, September 14, 2016 at 2:00PM** in the Santa Fe County Assessor's Conference Room located at 102 Grant Avenue, Santa Fe, New Mexico 87501. The Pre-Proposal Conference is not mandatory but attendance is strongly recommended.

EQUAL OPPORTUNITY EMPLOYMENT: All qualified Offerors will receive consideration of contract(s) without regard to race, color, religion, sex, national origin, ancestry, age, physical and mental handicap, serious mental condition, disability, spousal affiliation, sexual orientation or gender identity.

Request for proposals will be available by contacting Maricela Martinez, Procurement Specialist, Senior, 142 W. Palace Avenue (Second Floor), Santa Fe, New Mexico 87501, by telephone at (505) 992-9864 or by email at mcmartinez@santafecountynm.gov or on our website at http://www.santafecountynm.gov/asd/current_bid_solicitations

PROPOSALS RECEIVED AFTER THE DATE AND TIME SPECIFIED ABOVE WILL NOT BE CONSIDERED AND WILL BE REJECTED BY SANTA FE COUNTY.

Santa Fe County
Purchasing Division
Publish: September 4 & 5, 2016

II. INTRODUCTION

A. PURPOSE OF THIS REQUEST FOR PROPOSAL

The Office of the Santa Fe County Assessor is seeking printing services for the Assessor's Office official 2017 and 2018 Notices of Value, Business Personal Property Declarations with Cover Letter, and double-sided full color flyers to be inserted along with designated NOV's. We are seeking a one source supplier to design, print, variable image, CASS certify, prepare for mailing, and mail the state mandated documents.

B. BACKGROUND

The Office of County Assessor is responsible for the valuation and assessment of all real property, manufactured homes, business personal property, and livestock for property tax purposes in accordance with the New Mexico Property Tax Code Chapter 7 Article 35 through 38 of the NMSA.

The Assessor is mandated to produce and mail a "Notice of Value" to all owners of taxable property within Santa Fe County. All notices of value must be mailed, (or e-mailed at the owner's request), by April 1 of each tax year, unless and extension has been granted by the NM Property Tax Director. A significant amount of expense is associated with this requirement. The notice of value or NOV appraises the property owner of the valuation that is determined by the Assessor for property tax purposes. It also serves to inform the property owner of the time period for protesting the valuation, and filing for various exemptions.

Assessors are also statutorily responsible for the generation of the official tax schedule and must be submitted to the County Treasurer for levying and collecting property taxes based on the value of property on the tax schedule.

This is a brief and general description of the duties of the County Assessor. For a more detailed description of responsibilities please see the following link to the Assessor's "Property Valuation Maintenance Program":

http://www.santafecountynm.gov/media/files/Assessor/Historical/valuation%20%20re-inspection%20plan_2016.pdf

C. SCOPE OF WORK

General Specifications:

- a. Forms must comply with US Postal Regulations.
- b. The Contractor shall submit proofs of all forms for review by the Santa Fe County Assessor or his assignee by all negotiated deadlines. Written acknowledgment of final acceptance of all changes shall be required.

- c. The Contractor will be required to work with the Santa Fe County Assessor's Office to facilitate the transfer of electronic records necessary for testing and final imaging of desired notices. Proofs and tests are required and must be approved in writing by the Assessor no less than fifteen (15) days before print date.
- d. The "**Business Personal Property Declarations**" must be delivered to a US Post Office in Zip code sequence for first class pre-sort mailing on or before the delivery date as scheduled for 2017 (December 1, 2016) and 2018 (December 1, 2017). The pre-sort must meet all current postal automation requirements. The Notices are to be delivery point bar coded to meet and maximize postal discounts.
- e. The "**Notices of Value, or N.O.V's**" must be delivered to a US Post Office in Zip code sequence for first class pre-sort mailing on or before the delivery date as scheduled for 2017 (April 1, 2017) and 2018 (April 1, 2018). The pre-sort must meet all current postal automation requirements. The Notices are to be delivery point bar coded to meet and maximize postal discounts.

Failure to meet the negotiated deadline of any of the mailings will result in a penalty of 10% of total amount due per day after deadline up to a maximum of 50% of the total amount due for preparing and distributing the mailing. Penalty will be deducted from the payment due.

The negotiated schedule will be contingent upon the correct information being received in a timely manner from the Santa Fe County Assessors' Office. The awarded contractor is responsible to direct all actions through the Special Projects Administrator, Daniel Fresquez and to keep him apprised of all printing, scheduling and mailing matters.

Design and printing of mail pieces

- a. Contractor will use attached design as the basis for the final design of the printed piece. Minor changes to the attached design will be made at initial meeting between the awarded contractor and Daniel Fresquez. Forms will include a type 3 of 9 barcode representing an id tag corresponding to the Assessor's property identification. Proof must have written approval by the County Assessor or his designee.
- b. Contractor will be responsible for printing and on-time delivery of the printed material so the county's approximate mail date, as stated above, can be met.
- c. Delivery of proof of form design for **Business Personal Property Declarations with Cover Letter** no later than November 10, 2016 for 2017 and October 31, 2017 for 2018. 100 test mailers to be delivered to Assessor no later than November 30, 2016 for 2017 and November 10, 2017 for 2018.
- d. Delivery of proof of form design for **Notice of Values with and without Insert** no later than January 15, 2017 for 2017 and January 15, 2018 for 2018. 100 test mailers to be delivered to Assessor no later than February 1, 2017 for 2017 and February 1, 2018 for

2018.

- e. Fonts and lines per inch on the forms need to be such that the County can reprint duplicate forms in house.
- f. Business Personal Property Declarations with Cover Letter include:
 - Two pages, 8 ½" x 11" laser statements, printed with two (2) colors (red and black) on front and back, using 20# white paper stock.
 - One page, 8 ½" x 11" laser statements, (cover letter) printed with two (2) colors (red and black) on one side, using 20# white paper stock.
 - Approximately 2,700 units.
- g. Notices of Value include:
 - 1) Notice of Value - Real Property (With Flyer Insert)
 - One page, 8 ½" x 14" laser statements, printed on two (2) colors (black & red) on front and back, using 20# white paper stock.
 - 8 ½" x 11" flyers, printed in full color on front and back (see attached example), using 80# gloss text paper stock.
 - Approximately 58,000 units of each.
 - 2) Notice of Value - Real Property (No Insert)
 - One page, 8 ½" x 14" laser statements, printed on two (2) colors (black & red) on front and back, using 20# white paper stock.
 - Approximately 18,000 units.
 - 3) Notice of Value - Manufactured Homes (With Flyer Insert)
 - One page, 8 ½" x 14" laser statements, printed on two (2) colors (green & red) on front and back, using 20# white paper stock.
 - 8 ½" x 11" flyers, printed in full color on front and back (see attached example), using 80# gloss text paper stock.
 - Approximately 7,500 units.
 - 4) Notice of Value - Business Personal Property (No Insert)

- One page, 8 ½” x 14” laser statements, printed on two (2) colors (blue & red) on front and back, using 20# white paper stock.
 - Approximately 2,700 units.
- 5) Notice of Value - Affordable Housing (No Insert)
- One page, 8 ½” x 14” laser statements. Printed on two (2) colors (brown & red) on front and back, using 20# white paper stock.
 - Approximately 450 units.
- 6) Custom Envelope

Notice of Value forms will be sent using a custom envelope, printed with three (3) colors (black, gray, and red). The outer dimensions of the custom envelope should correspond to the outer dimensions of the standard #10 envelope. The left and bottom dimensions of the window will be the same; however, the height of the window may be up to an additional 3/8” in length, resulting in a window possibly as large as 1-1/2” x 4-1/2”. Return address and mailing permit in the standard position meeting postal requirements as set forth by the most current USPS guidelines.

7) Addressing

The addressing appearing through the window of the Notice of Value should contain the following:

- A line for the identification of the property id, notice type and year. Font size of at least 10, in block-type font (Arial preferred) convenient to OCR.
- Barcode for postal delivery, between 1/4” to 3/8” in height.
- Recipient Name and Address

Positioning of this information on the form should facilitate a clear view through the window. The form should not shift within the envelope. Failure for all the information above to be visible will constitute a misprint on the part of the selected vendor, applicable to Quality.

8) Samples

Samples are provided with this RFP for Real Property, Manufactured Homes, Business Personal Property, and Affordable Housing Notice of Values, as well as the Assessor’s Flyer.

The County will provide the variable information that is to be printed on the notices by electronic file to the contractor. The contractor will then process the data and print

the piece using the format that has been decided on by the County. The variable imaging can be applied by laser print, ink jet or high-speed impact directly on the face of the notice.

The contractor will program the data to handle multiple properties in an efficient and economical fashion within the framework of the laws. The County is not adverse from recommendations by awarded contractor for economic and efficient suggestions.

Mail Services

- a. The selected vendor must perform all required CASS services, mail sorting, and preparation to guarantee to the County that this mailing be dropped at the least amount of postage which will be sorted to automated carrier routing. Outgoing mailing pieces with Notice of Values enclosed, First Class permit and any other required postal indicia properly applied must be delivered fully sealed, addressed and presorted. Mailing can be done from point of production but should bear generic postal indicia.
- b. Mail Integrity: All work is to be done in-house by successful vendor. The successful vendor must present a statement of confidentiality letter that will protect the information that is provided to the mailer by the county. The selected vendor must provide written documentation by reports off their intelligent printer and inserter that will guarantee to the county that every notice was properly printed, inserted and mailed. These reports will include:
 - Times and totals Audit Report
 - This report will show the number of mail pieces that were sent through the inserter, the time and date that a particular address was inserted and provide an accurate audit trail for the proof that each piece was printed and mailed.
 - Fault Summary
 - This report will analyze the quality of printing, folding, and inserting and metering of the process. Should the machine jam, fail to insert or have any other difficulty with any notice in the run this report will highlight the problem, tell when and what occurred, which notice was affected and prove the situation was corrected and provide documentation that the notice was sent.
 - Fee County Summary
 - This report will verify by station (folder, inserter and meter machine) that every notice was printed, folded, inserted and

metered. When coupled with the fault summary and USPS form 3553, every notice will be accounted for from the tape provided by the county to the notice being placed in the mail.

- NCOA details
 - This report will identify changes to mailing addresses made by the USPS National Change of Address listing.
 - An Excel spreadsheet containing the information in the NCOA DETAILS report which clearly identifies the property id, original address, and modified address for each mailing sent to an address supplied by the NCOA process. The spreadsheet must isolate street 1, street 2, city, state, and zip-code from each other.
 - These computer-generated reports and spreadsheet are essential to the accuracy of the mailing and are the minimum standards that the county will accept. All reports spreadsheets due within fifteen (15) days of mailing. Reports and spreadsheets to be sent to the Assessor.

Imaging Services

- a. The selected vendor must supply scanned digital copies, on a DVD or CD, in color or black and white of every Notice of Value printed. An exact duplicate in color is preferred. There should be one digital copy per Notice of Value contained in a separate PDF file. The name of the file should be the property identification barcoded onto the Notice of Value.
- b. The selected vendor must supply with the PDF scanned images an index file identifying at least the property identification, recipient name, and full path to scanned digital copy on the DVD.
- c. The DVD of the scanned digital copies (as mentioned in a above) must be delivered and arrive at the Santa Fe County Assessor's office at least two business days prior to the date of mailing the Notices of Values.
- d. Scanned digital copies are not solicited for the Business Personal Property Declarations, Cover Letters, or Flyers.

Quality

- a. Should a printing, mailing, or imaging error be identified and associated with any human or mechanical error on the part of the selected vendor, the selected vendor is will reprint, mail, and reimage all potentially affected items at no additional cost to the Assessor's Office.

Additional Forms

- a. Any unused blank forms and flyers will be returned to the County Assessor's Office along with the corresponding number of envelopes.

D. INSURANCE REQUIREMENTS -See agreement template (Appendix D)

E. PROCUREMENT MANAGER

The County has designated a Procurement Manager who is responsible for the conduct of this procurement whose name, address and telephone number is listed below. All deliveries via express carrier should be addressed as follows:

Maricela Martinez
 Santa Fe County Purchasing Division
 142 W. Palace Avenue (Second Floor)
 Santa Fe, New Mexico 87501
 Phone (505) 992-9864
 Fax (505) 989-3243
mcmartinez@santafecountynm.gov

Any inquiries or requests regarding this procurement should be submitted to the Procurement Manager in writing. Offerors may contact ONLY the Procurement Manager regarding the procurement. Other County employees do not have the authority to respond on behalf of the County.

F. DEFINITION OF TERMINOLOGY

This section contains definitions and abbreviations that are used throughout this procurement document.

“BCC” means the elected Board of County Commissioners.

“Close of Business” means 5:00 PM Mountain Standard Time or Mountain Daylight Time, whichever is in effect on the date given.

“Contract” or “Agreement” means a written agreement for the procurement of items of tangible personal property or services.

“Contractor” means a successful offeror who enters into a binding contract.

“County” means Santa Fe County.

“Determination” means the written documentation of a decision by the Procurement Manager including findings of fact supporting a decision. A determination becomes part of the procurement file.

“Desirable” The terms “may”, “can”, “should”, “preferably”, or “prefers” identify a desirable or discretionary item or factor (as opposed to “mandatory”).

“Evaluation Committee” means a body appointed by the County management to perform the evaluation of offeror proposals.

“Finalist” is defined as an offeror who meets all the mandatory specifications of this Request for Proposals and whose score on evaluation factors is sufficiently high to merit further consideration by the Evaluation Committee.

“Mandatory” The terms “must”, “shall”, “will”, “is required”, or “are required”, identify a mandatory item or factor (as opposed to “desirable”). Failure to meet a mandatory item or factor will result in the rejection of the offeror’s proposal.

“Offeror” is any person, corporation, or partnership who chooses to submit a proposal.

“Procurement Manager” means the person or designee authorized by the County to manage or administer a procurement requiring the evaluation of competitive sealed proposals.

“Purchasing Division” means the Santa Fe County Purchasing Division, Administrative Services Department.

“Request for Proposals” or “RFP” means all documents, including those attached or incorporated by reference, used for soliciting proposals.

“Responsible Offeror” means an offeror who submits a responsive proposal and who has furnished, when required, information and data to prove that his financial resources, production or service facilities, personnel, service reputation and experience are adequate to make satisfactory delivery of the services or items of tangible personal property described in the proposal.

“Responsive Offer” or “Responsive Proposal” means an offer or proposal which conforms in all material respects to the requirements set forth in the request for proposals. Material respects of a request for proposals include, but are not limited to, price, quality, quantity or delivery requirements.

III. CONDITIONS GOVERNING THE PROCUREMENT

This section of the RFP contains the schedule for the procurement, describes the major procurement events and the conditions governing the procurement.

A. SEQUENCE OF EVENTS

The Procurement Manager will make every effort to adhere the following schedule:

	<u>Action</u>	<u>Responsibility</u>	<u>Date</u>
1.	Issue of RFP	Purchasing Division	Sept. 4 & 5, 2016
2.	Pre-Proposal Conference	Owner/Purchasing Offerors	Sept. 14, 2016
3.	Acknowledgement Form Due	Offerors	Sept. 14, 2016
4.	Deadline to Submit Additional Questions	Offerors	Sept. 21, 2016
5.	Response to Written Questions	Purchasing Division	Sept. 23, 2016
6.	Submission of Proposal 2:00 PM	Offerors	Oct. 3, 2016
7.	Proposal Evaluation	Evaluation Committee	Oct. 11, 2016 thru Oct. 17, 2016
8.	Selection of Finalists (If Applicable)	Evaluation Committee	Oct. 2016
9.	Best and Final Offers from Finalists (If Applicable)	Offeror	Oct. 2016
10.	Oral Presentation by Finalists (If Applicable)	Offeror	Oct. 2016
11.	Finalize Contract	County, Offeror	November 2016
12.	Contract Award	Purchasing Division	November 2016

Note: If the Evaluation Committee makes a selection at the Selection of Finalists, events 9-10 will not occur.

B. EXPLANATION OF EVENTS

The following paragraphs describe the activities listed in the sequence of events shown in Section III, Paragraph A.

1. **Issuance of RFP**

This RFP is being issued by the Santa Fe County Human Resources Department and the Purchasing Division.

2. **Pre-Proposal Conference**

A Pre-Proposal Conference is scheduled to occur on the date indicated in the Sequence of Events at Section III.A. Questions may be submitted at the Pre-Proposal Conference and until the date indicated in the Sequence of Events at Section III.A. A public log will be kept of the names of potential offerors that attended the pre-proposal conference. *Attendance at the Pre-Proposal conference is not mandatory but attendance is recommended.*

3. **Acknowledgement of Receipt Form Due**

Potential offerors should hand-deliver, return by facsimile or e-mail the "Acknowledgement of Receipt Form" provided as Appendix A to have its name and firm placed on the procurement distribution list. The form should be signed by an authorized representative of the organization, dated and returned by close of business on *September 14, 2016*.

The procurement distribution list will be used for the distribution of written responses to questions and any RFP addenda.

4. **Deadline to Submit Additional Written Questions**

Potential offerors may submit written questions regarding this RFP until the close of business on the date indicated in the Sequence of Events at Section III.A. All written questions must be addressed to the Procurement Manager, listed in Section II, Paragraph E and sent via facsimile or e-mail. *Any contact with any other County staff member other than the Procurement Manager named in this solicitation will be grounds for rejection of a proposal.*

5. **Response to Written Questions**

Written responses to written questions and any RFP addenda will be distributed on the date indicated in the Sequence of Events at Section III.A, to all potential offerors whose names appear on the procurement distribution list.

Additional written requests for clarification of distributed answers or addenda must be received by the Procurement Manager no later than one (1) day after the answers or addenda were issued.

6. Submission of Proposal

ALL OFFEROR PROPOSALS MUST BE RECEIVED FOR REVIEW AND EVALUATION BY THE PROCUREMENT MANAGER OR DESIGNEE NO LATER THAN **2:00 PM ON MONDAY, OCTOBER 3, 2016.** **Proposals received after this deadline will not be accepted.** The date and time of receipt will be recorded on each proposal. Proposals must be addressed and delivered to the Procurement Manager at the address listed in Section II, D. Proposals must be sealed and labeled on the outside of the package to clearly indicate that they are in response to the County's Request for Proposals RFP# 2017-0092-AO/MM and refer to the RFP number. Proposals submitted by facsimile or other electronic means will not be accepted.

Proposals must be delivered to:

Maricela Martinez, Senior Procurement Specialist
Santa Fe County Purchasing Division
142 W. Palace Avenue (Second Floor)
Santa Fe, New Mexico 87501

A public log will be kept of the names of all offeror's who submitted proposals. Pursuant to NMSA 1978, Section 13-1-116, the contents of any proposal shall not be disclosed so as to be available to competing offerors during the negotiation process.

7. Proposal Evaluation

The evaluation of proposals will be performed by an Evaluation Committee appointed by the Procurement Manager. This process will take place during the timeframe indicated in the Sequence of Events at III.A. During this time, the Procurement Manager may initiate discussions with offerors who submit responsive or potentially responsive proposals for the purpose of clarifying aspects of the proposals, but proposals may be accepted and evaluated without such discussion. Discussions SHALL NOT be initiated by the offerors.

8. Selection of Finalists (If Applicable)

The Evaluation Committee may select and the Procurement Manager may notify the finalist offerors on the date indicated in the Sequence of Events at Section III.A. Only finalists will be invited to participate in the subsequent steps of the procurement if the finalist process is used.

9. Best and Final Offers from Finalists (If Applicable)

Finalist offerors may be asked to submit revisions to their proposals for the purpose of obtaining best and final offers by the date indicated in the Sequence of Events at Section III.A.

10. Oral Presentation by Finalists (If Applicable)

Finalist offerors may be required to present their proposals to the Evaluation Committee. The Procurement Manager will schedule the time for each offeror presentation. All offeror presentations will be held at the Santa Fe County Purchasing Division, 142 W. Palace Avenue (Second Floor), Santa Fe, New Mexico. Each presentation will be limited to one (1) hour in duration.

11. Finalize Contract

The contract will be finalized with the most advantageous offeror during the timeframe indicated in the Sequence of Events at Section III.A. In the event that mutually agreeable terms cannot be reached within the time specified, the County reserves the right to finalize a contract with the next most advantageous offeror without undertaking a new procurement process.

12. Contract Award

The County anticipates awarding the contract on the date in the Sequence of Events at Section III.A. These dates are subject to change at the discretion of the Santa Fe County Purchasing Manager.

The contract shall be awarded to the offeror or offerors whose proposal is most advantageous to the County, taking into consideration the evaluation factors set forth in the RFP. The most advantageous proposal may or may not have received the most points.

13. Right to Protest

Any protest by an offeror must be timely and in conformance with NMSA 1978, Section 13-1-172 and applicable procurement regulations. Protests must be written and must include the name and address of the protestor and the request for proposals number. It must also contain a statement of grounds for protest including appropriate supporting exhibits. The protests must be delivered to the Santa Fe County Purchasing Division:

Santa Fe County
Attn: Procurement Office
P.O. Box 276
Santa Fe, New Mexico 87504

Protests will not be accepted by facsimile or other electronic means. Protests received after the deadline will not be accepted.

C. GENERAL REQUIREMENTS

This procurement will be conducted in accordance with Chapter 13, NMSA 1978, NMAC 1.4.1 and the Santa Fe County Procurement Regulations.

1. Acceptance of Conditions Governing the Procurement

Offerors must indicate their acceptance of the Conditions Governing the Procurement section in the Letter of Transmittal. Submission of a proposal constitutes acceptance of the contract template attached hereto as Appendix D.

2. Incurring Cost

Any cost incurred by the Offeror in preparation, transmittal, presentation of any proposal or material submitted in response to this RFP shall be borne solely by the Offeror.

3. Prime Contractor Responsibility

Any contract that may result from this RFP shall specify that the prime contractor is solely responsible for fulfillment of the contract with the County including any payments to subcontractors. The County will make contract payments to only the prime contractor.

4. Subcontractors

Use of subcontractors must be clearly explained in the proposal, and major subcontractors must be identified by name. The prime contractor shall be wholly responsible for the entire performance whether or not subcontractors are used.

5. Amended Proposals

An Offeror may submit an amended proposal before the deadline for receipt of proposals. Such amended proposals must be complete replacements for a previously submitted proposal and must be clearly identified as such in the transmittal letter. County personnel will not merge, collate, or assemble proposal materials.

6. Offerors' Rights to Withdraw Proposal

Offerors will be allowed to withdraw their proposals at any time prior to the deadline for receipt of proposals. The Offeror must submit a written withdrawal request signed by the Offeror's duly authorized representative addressed to the Procurement Manager. The approval or denial of withdrawal requests received after the deadline for receipt of the proposals is governed by the applicable procurement regulations.

7. Proposal Offer Firm

Responses to this RFP, including proposal prices, will be considered firm for ninety (90) days after the due date for receipt of proposals or ninety (90) days after receipt of a best and final offer if one is submitted.

8. Disclosure of Proposal Contents

After award, proposals, except contents for which the Offeror has made a written request for confidentiality, shall be open to public inspection. The Procurement Manager will not disclose or make public any pages of a proposal on which the Offeror has stamped or imprinted "proprietary" or "confidential" subject to the following requirements.

Proprietary or confidential data shall be readily separable from the proposal in order to facilitate eventual public inspection of the non-confidential portion of the proposal. Confidential data is normally restricted to confidential financial information concerning the Offeror's organization and data that qualifies as a trade secret in accordance with the Uniform Trade Secrets Act, 57-3A-1 to 57-3A-7, NMSA 1978. The price of products offered or the cost of services proposed shall not be designated as proprietary or confidential information.

If a request is received for disclosure of data for which an Offeror has made a written request for confidentiality, the Santa Fe County Procurement Manager shall examine the Offeror's request and make a written determination that specifies which portions of the proposal should be disclosed. Unless the Offeror takes legal action to prevent the disclosure, the proposal will be so disclosed. The proposal shall be open to public inspection subject to any continuing prohibition on the disclosure of confidential data.

9. No Obligation

This procurement in no manner obligates Santa Fe County or any of its departments to the use of any proposed professional services until a valid written contract is awarded and approved by the appropriate authorities.

10. Termination

This RFP may be canceled at any time and any and all proposals may be rejected in whole or in part when the County determines such action to be in the best interest of the County.

11. Sufficient Appropriation

Any contract awarded as a result of this RFP process may be terminated if sufficient appropriations or authorizations do not exist. Such termination will be effected by sending written notice to the contractor. The County's decision as to whether sufficient appropriations and authorizations are available will be accepted by the contractor as final.

12. Legal Review

The County requires that all Offerors agree to be bound by the General Requirements contained in this RFP. Any Offeror concerns must be promptly brought to the attention of the Procurement Manager.

13. Governing Law

This procurement and any agreement with Offerors that may result shall be governed by the laws of the State of New Mexico.

14. Basis for Proposal

Only information supplied by the County in writing through the Procurement Manager or in this RFP should be used as the basis for the preparation of Offeror proposals.

15. Contract Terms and Conditions

The contract between the County and the Contractor will follow the format specified by the County and contain the terms and conditions set forth in Appendix D.

However, the County reserves the right to negotiate with a successful Offeror provisions in addition to those contained in this RFP.

Should an Offeror object to any of the County's terms and conditions as contained in this Section or in Appendix C, that Offeror must propose specific alternative language. The County may or may not accept the alternative language. General references to the Offeror's terms and conditions or attempts at complete substitutions are not acceptable to the County and will result in disqualification of the Offeror's proposal.

Offerors must provide a brief discussion of the purpose and impact, if any, of each proposed change followed by the specific proposed alternate wording.

16. Offeror's Terms and Conditions

Offerors must submit with the proposal a complete set of any additional terms and conditions which they expect to have included in a contract negotiated with the County.

17. Contract Deviations

Any additional terms and conditions, which may be the subject of negotiation, will be discussed only between the County and the selected Offeror and shall not be deemed an opportunity to amend the Offeror's proposal.

18. Offeror Qualifications

The Evaluation Committee may make such investigations as necessary to determine the ability of the Offeror to adhere to the requirements specified within this RFP. The Evaluation Committee will reject the proposal of any Offeror who is not a responsible Offeror or fails to submit a responsive offer as defined in Sections 13-1-83 and 13-1-85 NMSA, 1978, subject to approval by the Procurement Manager.

19. Right to Waive Minor Irregularities

The Evaluation Committee reserves the right to waive minor irregularities. The Evaluation Committee also reserves the right to waive mandatory requirements provided that doing so does not otherwise materially affect the procurement. This right is at the sole discretion of the Evaluation Committee, subject to approval by the Procurement Manager.

20. Change in Contractor Representatives

The County reserves the right to require a change in contractor representatives if the assigned representatives are not, in the opinion of the County, meeting its needs adequately. Any change in contractor representative must receive prior County approval.

21. Notice

The Procurement Code, Sections 13-1-28 through 13-1-199, NMSA 1978, imposes civil and misdemeanor criminal penalties for its violation. In addition, the New Mexico criminal statutes impose felony penalties for bribes, gratuities and kick-backs.

22. County Rights

The County reserves the right to accept all or a portion of an Offeror's proposal.

23. Right to Publish

Throughout the duration of this procurement process and contract term, potential Offerors and contractors must secure from the County written approval prior to the release of any information that pertains to the potential work or activities covered by this procurement or the subsequent contract. Failure to adhere to this requirement may result in disqualification of the Offeror's proposal or termination of the contract.

24. Ownership of Proposals

All documents submitted in response to this Request for Proposals shall become the property of the County. However, any technical or user documentation submitted with the proposals of non-selected Offerors shall be returned after the expiration of the protest period.

25. Electronic Mail Address Required

A large part of the communication regarding this procurement will be conducted by electronic mail (e-mail). It is recommended that Offeror should have a valid e-mail address to receive this correspondence.

26. Preference in Procurement by Santa Fe County

a. New Mexico Resident Business Preference

New Mexico law, Section 13-1-21 NMSA 1978, provides a preference in the award of a public works contract for an “**in-state resident business.**” Application of a resident business preference for any Offeror requires the Offeror to provide a copy of a valid and current certificate as a resident business. Certificates are issued by the state taxation and revenue department.

If an Offeror submits with its proposal a copy of a valid and current in-state resident business certificate, 5% of the total weight of all evaluation factors used in the evaluation of proposals may be awarded or added to the Offerors score.

Certification by the department of taxation and revenue for the resident contractor takes into consideration such activities as the business or contractor's payment of property taxes or rent in the state and payment of unemployment insurance on employees who are residents of the state.

OR

b. New Mexico Resident Veteran Business Preference

New Mexico law, Section 13-1-22 NMSA 1978, provides a preference in the award of a public works contract for an **“in-state resident veteran business.”** Certification by the department of taxation and revenue for the resident veteran business requires the Offeror to provide evidence of annual revenue and other evidence of veteran status.

An Offeror who wants the veteran contractor preference to be applied to its proposal is required to submit with its proposal the certification from the NM Department of Taxation and Revenue and the sworn affidavit attached hereto as Appendix C.

If an Offeror submits with its proposal a copy of a valid and current veteran resident business certificate, 10%, 8% or 7% of the total weight of all the evaluation factors used in the evaluation of proposals may be awarded or added to the Offeror’s score, depending on the business’ annual revenue.

The resident business preference is not cumulative with the resident veteran business preference.

AND

c. Santa Fe County Business Preference

Santa Fe County Ordinance 2012-4 provides for a **County preference** for a “Santa Fe County business.” Application of the County preference in procurement requires an Offeror to obtain and provide a Santa Fe County Business Certificate issued by the Santa Fe County Procurement Manager. Certification by the Procurement Manager takes into consideration the business’ corporate standing in the state, business licensure or registration, the duration of the business’ primary office location and the payment of taxes.

If an Offeror submits with its proposal a copy of its Santa Fe County Business Certificate issued by the Purchasing Manager, 5% of the total weight of all the evaluation factors used in the evaluation of proposals may be awarded to the Offerors score.

The Resident Business, Resident Veteran Business or Santa Fe County Business preferences do not apply to procurement of services or goods involving federal funds or federal grant funds.

27. Double-Sided Documents

All submitted bids/proposal documents shall be double-sided, pursuant to Santa Fe County Resolution 2013-7, Adopting Sustainable Resource Management Principles, Section 2. A. Waste Reduction and Reuse...”all documents are to be double-sided, including those that are generated by outside entities using County funds and by consultants and contractors doing business with the County”.

28. Living Wage

Contractor shall comply with the requirements of Santa Fe County Ordinance No. 2014-1 (Establishing a Living Wage).

IV. RESPONSE FORMAT AND ORGANIZATION

A. NUMBER OF RESPONSES

An offeror shall submit one proposal in response to this RFP.

B. NUMBER OF COPIES

Offerors shall deliver one (1) original and five (5) identical copies of their proposal to the location specified in Section II, Paragraph D on or before the closing date and time for receipt of proposals.

C. PROPOSAL FORMAT

All proposals shall be limited to fifteen (15) pages, with the exception of professional licenses and certifications, which shall be added as appendices. The document shall be typewritten on standard 8 1/2 x 11 paper, with a font no smaller than 10 pt. pitch, with nominal 1" margins and normal line spacing. Proposals shall be placed within a binder with tabs delineating each section.

1. Proposal Organization

The proposal must be organized and indexed in the following format and must contain, as a minimum, all listed items in the sequence indicated.

- a) Letter of Transmittal
- b) Table of Contents
- c) Proposal Summary (optional)
- d) Response to Evaluation Factors
- e) Separate cost proposal (Appendix C) in an additional sealed envelope.

Within each section of their proposal, offerors should address the items in the order in which they appear in this RFP. All forms provided in the RFP must be thoroughly completed and included in the appropriate section of the proposal.

Any proposal that does not adhere to these requirements may be deemed non-responsive and rejected on that basis.

The proposal summary may be included by offerors to provide the Evaluation Committee with an overview of the technical and business features of the proposal; however, this material will not be used in the evaluation process unless specifically referenced from other portions of the offeror's proposal.

Offerors may attach other materials that they feel may improve the quality of their responses. However, these materials should be included as items in a separate appendix.

2. Letter of Transmittal

Each proposal must be accompanied by a letter of transmittal. The letter of transmittal MUST:

- a) Identify the submitting organization;
- b) Identify the name and title of the person authorized by the organization to contractually obligate the organization;
- c) Identify the name, title and telephone number of the person authorized to negotiate the contract on behalf of the organization;
- d) Identify the names, titles and telephone numbers of persons to be contacted for clarification;
- e) Explicitly indicate Acceptance of the Conditions Governing the Procurement stated in Section III, Paragraph C.1;
- f) Be signed by the person authorized to contractually obligate the organization;
- g) Acknowledge receipt of any and all amendments to this RFP.

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V. SPECIFICATIONS

Offerors should respond in the form of a thorough narrative to each mandatory specification. The narratives along with required supporting materials will be evaluated and awarded points accordingly.

A. INFORMATION

Time Frame

The contract is scheduled to begin in or around November 2016 with a term of one (1) year and with the option of three (3) renewal periods, not to exceed a total of four years.

B. EVALUATION CRITERIA

A brief explanation of each evaluation criteria are listed below. Offerors are encouraged to fully address each criterion, as points are available for the Offeror's response to each.

1. Evidence of Understanding Scope of Work

- Provide an in depth response and understanding of the requested scope of work.
- Any service listed in the RFP that cannot be provided should be noted.

2. Capacity and Capability

- Provide a summary of firm's location(s), administration, management, organization and staffing, include multiple offices, if applicable.
- Identify the technology and equipment that will be used in production for Santa Fe County Assessor's printing needs.
- Provide a description of the firm's capability to receive and reproduce text, including word processing compatible graphics via electronic files (email, internet, disk or drive).
- Provide a detailed description of efforts your firm will undertake to achieve client satisfaction and to satisfy the requirements of the "Scope of Work" listed in this RFP.
- Identify cost savings measures, if any, which could be implemented by and for the County.
- Identify any challenges or issues that might be encountered during performance of printing services.

- Include a project schedule, identifying all tasks and deliverables to be completed that demonstrates firm’s ability to meet specific schedules and deadlines.

3. Past Experience

- Provide a brief introduction and overview including history, background, philosophy and vision of firm. Describe the firm’s vision/mission in providing printing services.
- Provide an overview of current and prior experience in work comparable to the Scope of Work required in this RFP.
- Provide references for similar successful projects from three governmental agencies including the name of the agency, contact name, telephone and email address. If no government experience is available, please provide any relevant service experience.

- C. Cost Proposal in a Separate Sealed Envelope- For this RFP, each offeror shall submit (1) one cost proposal (Appendix C) in a separate sealed envelope with the original proposal. The cost proposal shall include the price for each listed protocol. The outside of the sealed envelope shall clearly indicate the RFP number, the offeror’s name, address and the words “Cost Proposal”.

VI. EVALUATION

A. EVALUATION SCORING

The County will evaluate responsive proposals and assign a numerical score in each category, not to exceed the maximum allowed score for that category, as determined through the Offeror’s attention to the criteria detailed in the following sections. The amount of discussion to be applied to each listed topic is an individual choice of the Offeror, however, discussion should be detailed enough to inform and educate the Evaluation Committee Members.

Proposals will be scored based upon a comparison of the information submitted by each Offeror against the evaluation criteria outlined below. Each Evaluation Criteria is assigned the following points:

1. Evidence of Understanding Scope of Work	200 points
2. Capacity and Capability.....	400 points
3. Past Record of Performance	400 points
TOTAL POINTS.....	1000 points

PREFERENCES

If a proposal contains New Mexico Resident Business Certificate or New Mexico Resident Veterans Business Certificate and/or Santa Fe County Business Certificate, the applicable preference will be applied in accordance with Section 13-1-21-NMSA 1978, and the County Purchasing Regulations.

- | | | |
|------------|--|-----------------------------|
| 6. | Proposal contains a valid N.M. Resident Business Certificate..... | 50 points |
| OR | | |
| 7. | Proposal contains valid N.M. Resident Veteran Business Certificate | 70, 80 or 100 points |
| AND | | |
| 8. | Proposal contains a valid Santa Fe County Business Certificate..... | 50 points |

B. EVALUATION PROCESS

The evaluation process will follow the steps listed below:

1. All Offeror proposals will be reviewed for compliance with the mandatory specifications stated within the RFP. Proposals deemed non-responsive will be eliminated from further consideration.
2. The Procurement Manager may contact the Offeror for clarification of the response as specified in Section III.B.7.
3. The Evaluation Committee may use other sources of information to perform the evaluation as specified in Section III.C.18.
4. Responsive proposals will be evaluated on the factors in Section V that have been assigned a point value. The responsible Offerors with the highest scores will be selected as finalist Offerors ‘shortlisted’ based upon the proposals submitted. If an oral presentation is recommended, the ‘shortlisted’ firms will be provided questions by the Selection Committee for their “Oral Presentations.” Each presentation will be evaluated by the Selection Committee. The oral presentation that receives the highest points and is most advantageous to the County, taking into consideration the evaluation factors in Section V, will be recommended for contract award as specified in Section III.B.11. Only the points from the Oral Presentation will be calculated for most & highest qualified Offeror. Points from the “shortlisted” evaluations will only be used if there is a tie resulting from the Oral Presentations. Please note, however, that a serious deficiency in the response to any one factor may be grounds for rejection regardless of overall score.

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APPENDIX A**ACKNOWLEDGEMENT OF RECEIPT FORM****PRINTING SERVICES FOR NOTICE OF VALUES (NOVS) AND BUSINESS
PERSONAL PROPERTY DECLARATIONS****RFP# 2017-0092-AO/MM**

In acknowledgement of receipt of this Request for Proposal the undersigned agrees that he/she has received a complete copy, beginning with the title page and table of contents, and ending with Appendix D.

The acknowledgement of receipt should be signed and returned to the Procurement Manager no later than close of business on **September 14, 2016**. Only potential offerors who elect to return this form completed with the indicated intention of submitting a proposal will receive copies of all offeror written questions and the County's written responses to those questions as well as RFP amendments, if any are issued.

FIRM: _____

REPRESENTED BY: _____

TITLE: _____ PHONE NO.: _____

E-MAIL: _____ FAX NO.: _____

ADDRESS: _____

CITY: _____ STATE: _____ ZIP CODE: _____

SIGNATURE: _____ DATE: _____

This name and address will be used for all correspondence related to the Request for Proposal.

Firm does/does not (**circle one**) intend to respond to this Request for Proposals.

Maricela Martinez
Santa Fe County Purchasing Division
142 W. Palace Avenue (Second Floor)
Santa Fe, New Mexico 87501
(505) 992-9864
(505) 989-3243
mcmartinez@santafecountynm.gov

APPENDIX B

CAMPAIGN CONTRIBUTION DISCLOSURE FORM

Pursuant to the Procurement Code, Sections 13-1-28, et seq., NMSA 1978 and NMSA 1978, § 13-1-191.1 (2006), as amended by Laws of 2007, Chapter 234, any prospective contractor seeking to enter into a contract with any state agency or local public body **for professional services, a design and build project delivery system, or the design and installation of measures the primary purpose of which is to conserve natural resources** must file this form with that state agency or local public body. This form must be filed even if the contract qualifies as a small purchase or a sole source contract. The prospective contractor must disclose whether they, a family member or a representative of the prospective contractor has made a campaign contribution to an applicable public official of the state or a local public body during the two years prior to the date on which the contractor submits a proposal or, in the case of a sole source or small purchase contract, the two years prior to the date the contractor signs the contract, if the aggregate total of contributions given by the prospective contractor, a family member or a representative of the prospective contractor to the public official exceeds two hundred and fifty dollars (\$250) over the two year period.

Furthermore, the state agency or local public body may cancel a solicitation or proposed award for a proposed contract pursuant to Section 13-1-181 NMSA 1978 or a contract that is executed may be ratified or terminated pursuant to Section 13-1-182 NMSA 1978 of the Procurement Code if: 1) a prospective contractor, a family member of the prospective contractor, or a representative of the prospective contractor gives a campaign contribution or other thing of value to an applicable public official or the applicable public official's employees during the pendency of the procurement process or 2) a prospective contractor fails to submit a fully completed disclosure statement pursuant to the law.

The state agency or local public body that procures the services or items of tangible personal property shall indicate on the form the name or names of every applicable public official, if any, for which disclosure is required by a prospective contractor.

THIS FORM MUST BE INCLUDED IN THE REQUEST FOR PROPOSALS AND MUST BE FILED BY ANY PROSPECTIVE CONTRACTOR WHETHER OR NOT THEY, THEIR FAMILY MEMBER, OR THEIR REPRESENTATIVE HAS MADE ANY CONTRIBUTIONS SUBJECT TO DISCLOSURE.

The following definitions apply:

“Applicable public official” means a person elected to an office or a person appointed to complete a term of an elected office, who has the authority to award or influence the award of the contract for which the prospective contractor is submitting a competitive sealed proposal or who has the authority to negotiate a sole source or small purchase contract that may be awarded without submission of a sealed competitive proposal.

“Campaign Contribution” means a gift, subscription, loan, advance or deposit of money or other thing of value, including the estimated value of an in-kind contribution, that is made to or received by an applicable public official or any person authorized to raise, collect or expend contributions on that official’s behalf for the purpose of electing the official to statewide or local office. “Campaign Contribution” includes the payment of a debt incurred in an election campaign, but does not include the value of services provided without compensation or unreimbursed travel or other personal expenses of individuals who volunteer a portion or all of their time on behalf of a candidate or political committee, nor does it include the administrative or solicitation expenses of a political committee that are paid by an organization that sponsors the committee.

“Family member” means spouse, father, mother, child, father-in-law, mother-in-law, daughter-in-law or son-in-law of (a) a prospective contractor, if the prospective contractor is a natural person; or (b) an owner of a prospective contractor.

“Pendency of the procurement process” means the time period commencing with the public notice of the request for proposals and ending with the award of the contract or the cancellation of the request for proposals.

“Prospective contractor” means a person or business that is subject to the competitive sealed proposal process set forth in the Procurement Code or is not required to submit a competitive sealed proposal because that person or business qualifies for a sole source or a small purchase contract.

“Representative of a prospective contractor” means an officer or director of a corporation, a member or manager of a limited liability corporation, a partner of a partnership or a trustee of a trust of the prospective contractor.

Name(s) of Applicable Public Official(s) if any: _____
(Completed by State Agency or Local Public Body)

DISCLOSURE OF CONTRIBUTIONS BY PROSPECTIVE CONTRACTOR:

Contribution Made By: _____

Relation to Prospective Contractor: _____

Date Contribution(s) Made: _____

Amount(s) of Contribution(s) _____

Nature of Contribution(s) _____

Purpose of Contribution(s)

(Attach extra pages if necessary)

Signature

Date

Title (position)

--OR--

NO CONTRIBUTIONS IN THE AGGREGATE TOTAL OVER TWO HUNDRED FIFTY DOLLARS (\$250) WERE MADE to an applicable public official by me, a family member or representative.

Signature

Date

Title (Position)

APPENDIX C

COST PROPOSAL

Business Personal Property Declarations with Cover Letters

- Two pages, 8 ½" x 11" laser statements, printed with two (2) colors (red and black) on front and back, using 20# white paper stock.
- One page, 8 ½" x 11" laser statements, printed with one (1) color (black) on one side, using 20# white paper stock.
- Printing, stuffing, and distribution.
- Approximately 2,700 units.

\$_____ each piece

Notice of Value - Real Property (With Insert)

- One page, 8 ½" x 14" laser statements, printed on two (2) colors (black & red) on front and back, using 20# white paper stock.
- Printing, custom envelope, stuffing, distribution, and imaging.
- Approximately 58,000 units.

\$_____ each piece

Notice of Value - Real Property (No Insert)

- One page, 8 ½" x 14" laser statements, printed on two (2) colors (black & red) on front and back, using 20# white paper stock.
- Printing, custom envelope, stuffing, distribution, and imaging.
- Approximately 18,000 units.

\$_____ each piece

Notice of Value - Manufactured Homes (No Insert)

- One page, 8 ½" x 14" laser statements, printed on two (2) colors (green & red) on front and back, using 20# white paper stock.
- Printing, custom envelope, stuffing, distribution, and imaging.

- Approximately 7,500 units.

\$_____ each piece

Notice of Value - Business Personal Property (No Insert)

- One page, 8 ½” x 14” laser statements, printed on two (2) colors (blue & red) on front and back, using 20# white paper stock.
- Printing, custom envelope, stuffing, distribution, and imaging.
- Approximately 2,700 units.

\$_____ each piece

Notice of Value - Affordable Housing (No Insert)

- One page, 8 ½” x 14” laser statements, printed on two (2) colors (brown & red) on front and back, using 20# white paper stock.
- Printing, custom envelope, stuffing, distribution, and imaging.
- Approximately 450 units.

\$_____ each piece

Color Flyer (a.k.a. Insert)

- 8 ½ “x 11” flyers, printed in full color on front and back (see attached example), using 80# gloss text paper stock.
- Approximately 67,000 units.

\$_____ each piece

APPENDIX D
SAMPLE PROFESSIONAL SERVICES AGREEMENT
WITH _____
TO PROVIDE PRINTING SERVICES FOR NOTICE OF VALUES (NOVS) AND
BUSINESS PERSONAL PROPERTY DECLARATIONS

THIS AGREEMENT is made and entered into on this ____ day of _____, 2016, by and between **SANTA FE COUNTY** (hereinafter referred to as the “County”), an New Mexico political subdivision, and **XXXXX**, a _____ corporation with a principal address located at _____, (hereinafter referred to as the "Contractor").

WHEREAS, the Santa Fe County Assessor’s Office and the Procurement Division are soliciting for Printing Services for Notice of Value, Business Personal Property Declrations with Coverletter, and double-sided full color flyers to be inserted along with designated NOVs; and

WHEREAS, pursuant to NMSA 1978, Sections 13-1-112 and 13-1-117, competitive, sealed proposals were solicited via a formal request for proposals, RFP No. 2017-0092-AO/MM for this service;

WHEREAS, based upon the evaluation criteria established within the request for proposals for the purposes of selecting the most qualified Offeror, the County has determined the Contractor as the most responsive and highly rated Offeror;

WHEREAS, the County requires the services of the Contractor, and the Contractor is willing to provide these services and both parties wish to enter into this Agreement

NOW THEREFORE, in consideration of the premises and mutual obligations herein, the parties hereto do mutually agree as follows:

1. SCOPE OF WORK

General Specifications:

- a. Forms must comply with US Postal Regulations.
- b. The Contractor shall submit proofs of all forms for review by the Santa Fe County Assessor or his assignee by all negotiated deadlines. Written acknowledgment of final acceptance of all changes shall be required.
- c. The Contractor will be required to work with the Santa Fe County Assessor’s Office to facilitate the transfer of electronic records necessary for testing and final imaging of desired notices. Proofs and tests are required and must be approved in writing by the Assessor no less than fifteen (15) days before print date.
- d. The “**Business Personal Property Declarations**” must be delivered to a US Post Office in Zip code sequence for first class pre-sort mailing on or before the delivery date as

scheduled for 2017 (December 1, 2016) and 2018 (December 1, 2017). The pre-sort must meet all current postal automation requirements. The Notices are to be delivery point bar coded to meet and maximize postal discounts.

- e. The “**Notices of Value, or N.O.V’s**” must be delivered to a US Post Office in Zip code sequence for first class pre-sort mailing on or before the delivery date as scheduled for 2017 (April 1, 2017) and 2018 (April 1, 2018). The pre-sort must meet all current postal automation requirements. The Notices are to be delivery point bar coded to meet and maximize postal discounts.

Failure to meet the negotiated deadline of any of the mailings will result in a penalty of 10% of total amount due per day after deadline up to a maximum of 50% of the total amount due for preparing and distributing the mailing. Penalty will be deducted from the payment due.

The negotiated schedule will be contingent upon the correct information being received in a timely manner from the Santa Fe County Assessors’ Office. The awarded contractor is responsible to direct all actions through the Special Projects Administrator, Daniel Fresquez and to keep him apprised of all printing, scheduling and mailing matters.

Design and printing of mail pieces

- a. Contractor will use attached design as the basis for the final design of the printed piece. Minor changes to the attached design will be made at initial meeting between the awarded contractor and Daniel Fresquez. Forms will include a type 3 of 9 barcode representing an id tag corresponding to the Assessor’s property identification. Proof must have written approval by the County Assessor or his designee.
- b. Contractor will be responsible for printing and on-time delivery of the printed material so the county’s approximate mail date, as stated above, can be met.
- c. Delivery of proof of form design for **Business Personal Property Declarations with Cover Letter** no later than November 10, 2016 for 2017 and November 30, 2017 for 2018. 100 test mailers to be delivered to Assessor no later than November 10, 2016 for 2017 and November 10, 2017 for 2018.
- d. Delivery of proof of form design for **Notice of Values with and without Insert** no later than January 15, 2017 for 2017 and January 15, 2018 for 2018. 100 test mailers to be delivered to Assessor no later than February 1, 2017 for 2017 and February 1, 2018 for 2018.
- e. Fonts and lines per inch on the forms need to be such that the County can reprint duplicate forms in house.
- f. Business Personal Property Declarations with Cover Letter include:

- Two pages, 8 ½" x 11" laser statements, printed with two (2) colors (red and black) on front and back, using 20# white paper stock.
- One page, 8 ½" x 11" laser statements, (cover letter) printed with two (2) colors (red and black) on one side, using 20# white paper stock.
- Approximately 2,700 units.

g. Notices of Value include:

1) Notice of Value - Real Property (With Flyer Insert)

- One page, 8 ½" x 14" laser statements, printed on two (2) colors (black & red) on front and back, using 20# white paper stock.
- 8 ½" x 11" flyers, printed in full color on front and back (see attached example), using 80# gloss text paper stock.
- Approximately 58,000 units of each.

2) Notice of Value - Real Property (No Insert)

- One page, 8 ½" x 14" laser statements, printed on two (2) colors (black & red) on front and back, using 20# white paper stock.
- Approximately 18,000 units.

3) Notice of Value - Manufactured Homes (With Flyer Insert)

- One page, 8 ½" x 14" laser statements, printed on two (2) colors (green & red) on front and back, using 20# white paper stock.
- 8 ½" x 11" flyers, printed in full color on front and back (see attached example), using 80# gloss text paper stock.
- Approximately 7,500 units.

4) Notice of Value - Business Personal Property (No Insert)

- One page, 8 ½" x 14" laser statements, printed on two (2) colors (blue & red) on front and back, using 20# white paper stock.
- Approximately 2,700 units.

5) Notice of Value - Affordable Housing (No Insert)

- One page, 8 ½" x 14" laser statements. Printed on two (2) colors (brown & red) on front and back, using 20# white paper stock.
- Approximately 450 units.

6) Custom Envelope

Notice of Value forms will be sent using a custom envelope, printed with three (3) colors (black, gray, and red). The outer dimensions of the custom envelope should correspond to the outer dimensions of the standard #10 envelope. The left and bottom dimensions of the window will be the same; however, the height of the window may be up to an additional 3/8" in length, resulting in a window possibly as large as 1-1/2" x 4-1/2". Return address and mailing permit in the standard position meeting postal requirements as set forth by the most current USPS guidelines.

7) Addressing

The addressing appearing through the window of the Notice of Value should contain the following:

- A line for the identification of the property id, notice type and year. Font size of at least 10, in block-type font (Arial preferred) convenient to OCR.
- Barcode for postal delivery, between 1/4" to 3/8" in height.
- Recipient Name and Address

Positioning of this information on the form should facilitate a clear view through the window. The form should not shift within the envelope. Failure for all the information above to be visible will constitute a misprint on the part of the selected vendor, applicable to Section 8, Quality, (a).

8) Samples

Samples are provided with this RFP for Real Property, Manufactured Homes, Business Personal Property, and Affordable Housing Notice of Values, as well as the Assessor's Flyer.

The County will provide the variable information that is to be printed on the notices by electronic file to the contractor. The contractor will then process the data and print the piece using the format that has been decided on by the County. The variable imaging can be applied by laser print, ink jet or high-speed impact directly on the face of the notice.

The contractor will program the data to handle multiple properties in an efficient and economical fashion within the framework of the laws. The County is not adverse from recommendations by awarded contractor for economic and efficient suggestions.

Mail Services

- a. The selected vendor must perform all required CASS services, mail sorting, and preparation to guarantee to the County that this mailing be dropped at the least amount of postage which will be sorted to automated carrier routing. Outgoing mailing pieces with Notice of Values enclosed, First Class permit and any other required postal indicia properly applied must be delivered fully sealed, addressed and presorted. Mailing can be done from point of production but should bear generic postal indicia.
- b. Mail Integrity: All work is to be done in-house by successful vendor. The successful vendor must present a statement of confidentiality letter that will protect the information that is provided to the mailer by the county. The selected vendor must provide written documentation by reports off their intelligent printer and inserter that will guarantee to the county that every notice was properly printed, inserted and mailed. These reports will include:
 - Times and totals Audit Report
 - This report will show the number of mail pieces that were sent through the inserter, the time and date that a particular address was inserted and provide an accurate audit trail for the proof that each piece was printed and mailed.
 - Fault Summary
 - This report will analyze the quality of printing, folding, and inserting and metering of the process. Should the machine jam, fail to insert or have any other difficulty with any notice in the run this report will highlight the problem, tell when and what occurred, which notice was affected and prove the situation was corrected and provide documentation that the notice was sent.
 - Fee County Summary
 - This report will verify by station (folder, inserter and meter machine) that every notice was printed, folded, inserted and metered. When coupled with the fault summary and USPS form 3553, every notice will be accounted for from the tape provided by the county to the notice being placed in the mail.
 - NCOA details
 - This report will identify changes to mailing addresses made

by the USPS National Change of Address listing.

- An Excel spreadsheet containing the information in the NCOA DETAILS report which clearly identifies the property id, original address, and modified address for each mailing sent to an address supplied by the NCOA process. The spreadsheet must isolate street 1, street2, city, state, and zip-code from each other.
- These computer-generated reports and spreadsheet are essential to the accuracy of the mailing and are the minimum standards that the county will accept. All reports spreadsheets due within fifteen (15) days of mailing. Reports and spreadsheets to be sent to the Assessor.

Imaging Services

- a. The selected vendor must supply scanned digital copies, on a DVD or CD, in color or black and white of every Notice of Value printed. An exact duplicate in color is preferred. There should be one digital copy per Notice of Value contained in a separate PDF file. The name of the file should be the property identification barcoded onto the Notice of Value.
- b. The selected vendor must supply with the PDF scanned images an index file identifying at least the property identification, recipient name, and full path to scanned digital copy on the DVD.
- c. The DVD of the scanned digital copies (as mentioned in a above) must be delivered and arrive at the Santa Fe County Assessor's office at least two business days prior to the date of mailing the Notices of Values.
- d. Scanned digital copies are not solicited for the Business Personal Property Declarations, Cover Letters, or Flyers.

Quality

- a. Should a printing, mailing, or imaging error be identified and associated with any human or mechanical error on the part of the selected vendor, the selected vendor is will reprint, mail, and reimage all potentially affected items at no additional cost to the Assessor's Office.

Additional Forms

- a. Any unused blank forms and flyers will be returned to the County Assessor's Office along with the corresponding number of envelopes.

2. ADDITIONAL SERVICES

A. The parties agree that all tasks set forth in Section 1 (Scope of Work), of this Agreement shall be completed in full, to the satisfaction of the County, in accordance with professional standards and for the amount set forth in Section 3 (Compensation, Invoicing and Set-off), of this Agreement, and for no other cost, amount, fee or expense.

B. The County may from time to time request changes in the scope of work to be performed hereunder. Such changes, including any increase or decrease in the amount of the Contractor's compensation, which are mutually agreed upon by and between the County and the Contractor, shall be incorporated in a written amendment to this Agreement.

3. COMPENSATION, INVOICING AND SET-OFF

A. In consideration of its obligations under this Agreement the Contractor shall be compensated as follows:

- 1) County shall pay to the Contractor in full payment for services satisfactorily performed.
- 2) The total amount payable to the Contractor under this Agreement shall not exceed **[WRITTEN WORD]** dollars **(\$XX,XXX.XX) inclusive or exclusive** of New Mexico gross receipts tax.
- 3) 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. The County will notify the Contractor 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.

B. The Contractor shall submit a written request for payment to the County when payment is due under this Agreement. Upon the County's receipt of the written request, the County shall issue a written certification of complete or partial acceptance or rejection of the deliverables for which payment is sought.

- 1) The County's representative for certification of acceptance or rejection of contractual items and services shall be **[USER AGENCY]**

NAME/INDIVIDUAL, ADDRESS AND PHONE NUMBER], or such other individual as may be designated in the absence of the County representative.

- 2) The Contractor acknowledges and agrees that the County may not make any payment hereunder unless and until it has issued a written certification accepting the contractual services or deliverables.
- 3) Within 30 days of the issuance of a written certification accepting the services or deliverables, the County shall tender payment for the accepted items or services. In the event the County fails to tender payment within 30 days of the written certification accepting the items or services, the County shall pay late payment charges of one and one-half percent (1.5%) per month, until the amount due is paid in full.

C. In the event the Contractor breaches this Agreement, the County may, without penalty, withhold any payments due the Contractor for the purpose of set-off until such time as the County determines the exact amount of damages it suffered as a result of the breach.

D. Payment under this Agreement shall not foreclose the right of the County to recover excessive or illegal payment.

4. EFFECTIVE DATE AND TERM

This Agreement shall, upon due execution by all parties, become effective as of the date first written above and shall terminate _____ later, unless earlier terminated pursuant to Section 5 (Termination) or Section 6 (Appropriations and Authorizations). The County has the option to extend the term of this Agreement in _____ increments not to exceed four years in total

5. TERMINATION

A. Termination of Agreement for Cause. Either party may terminate the Agreement based upon any material breach of this Agreement by the other party. The non-breaching party shall give the breaching party written notice of termination specifying the grounds for the termination. The termination shall be effective 30 days from the breaching party's receipt of the notice of termination, during which time the breaching party shall have the right to cure the breach. If, however, the breach cannot with due diligence be cured within 30 days, the breaching party shall have a reasonable time to cure the breach, provided that, within 30 days of its receipt of the written notice of termination, the breaching party began to cure the breach and advised the non-breaching party in writing that it intended to cure.

B. Termination for Convenience of the County. The County may, in its discretion, terminate this Agreement at any time for any reason by giving the Contractor written notice of termination. The notice shall specify the effective date of termination, which shall not be less than 15 days from the Contractor's receipt of the notice. The County shall pay the Contractor for acceptable work, determined in accordance with the specifications and standards set forth in this

Agreement, performed before the effective date of termination but shall not be liable for any work performed after the effective date of termination.

6. APPROPRIATIONS AND AUTHORIZATIONS

This Agreement is contingent upon sufficient appropriations and authorizations being made for performance of this Agreement by the Board of County Commissioners of the County and/or, if state funds are involved, the Legislature of the State of New Mexico. If sufficient appropriations and authorizations are not made in this or future fiscal years, this Agreement shall terminate upon written notice by the County to the Contractor. Such termination shall be without penalty to the County, and the County shall have no duty to reimburse the Contractor for expenditures made in the performance of this Agreement. The County is expressly not committed to expenditure of any funds until such time as they are programmed, budgeted, encumbered and approved for expenditure by the County. The County's decision as to whether sufficient appropriations and authorizations have been made for the fulfillment of this Agreement shall be final and not subject to challenge by the Contractor in any way or forum, including a lawsuit.

7. INDEPENDENT CONTRACTOR

The Contractor and its agents and employees are independent contractors and are not employees or agents of the County. Accordingly, the Contractor and its agents and employees shall not accrue leave, participate in retirement plans, insurance plans, or liability bonding, use County vehicles, or participate in any other benefits afforded to employees of the County. Except as may be expressly authorized elsewhere in this Agreement, the Contractor has no authority to bind, represent, or otherwise act on behalf of the County and agrees not to purport to do so.

8. 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 advance written approval of the County. Any attempted assignment or transfer without the County's advance written approval shall be null and void and without any legal effect.

9. SUBCONTRACTING

The Contractor shall not subcontract or delegate any portion of the services to be performed under this Agreement without the advance written approval of the County. Any attempted subcontracting or delegating without the County's advance written approval shall be null and void and without any legal effect.

10. PERSONNEL

A. All work performed under this Agreement shall be performed by the Contractor or under its supervision.

B. The Contractor represents that it has, or will secure at its own expense, all personnel required to discharge its obligations under this Agreement. Such personnel (i) shall not be employees of or have any contractual relationships with the County and (ii) shall be fully qualified and licensed or otherwise authorized or permitted under federal, state, and local law to perform such work.

11. RELEASE

Upon its receipt of all payments due under this Agreement, the Contractor releases the County, its elected officials, officers, agents and employees from all liabilities, claims, and obligations whatsoever arising from or under or relating to this Agreement.

12. 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 County.

13. PUBLICATION, REPRODUCTION, AND USE OF MATERIAL; COPYRIGHT

A. The County has the unrestricted right to publish, disclose, distribute and otherwise use, in whole or in part, any reports, data, or other material prepared under or pursuant to this Agreement.

B. The Contractor acknowledges and agrees that any material produced in whole or in part under or pursuant to this Agreement is a work made for hire. Accordingly, to the extent that any such material is copyrightable in the United States or in any other country, the County shall own any such copyright.

14. CONFLICT OF INTEREST

The Contractor represents that it has no and shall not acquire any interest, direct or indirect, that would conflict in any manner or degree with the performance of its obligations under this Agreement.

15. NO ORAL MODIFICATIONS; WRITTEN AMENDMENTS REQUIRED

This Agreement may not be modified, altered, changed, or amended orally but, rather, only by an instrument in writing executed by the parties hereto. The Contractor specifically acknowledges and agrees that the County shall not be responsible for any changes to Section 1 (Scope of Work), of this Agreement unless such changes are set forth in a duly executed written amendment to this Agreement.

16. ENTIRE AGREEMENT; INTEGRATION

This Agreement incorporates all the agreements, covenants, and understandings between the

parties hereto concerning the subject matter hereof, and all such agreements, covenants and understandings have been merged into this written Agreement. No prior or contemporaneous agreement, covenant or understandings, verbal or otherwise, of the parties or their agents shall be valid or enforceable unless embodied in this Agreement.

17. NOTICE OF PENALTIES

The Procurement Code, NMSA 1978, Sections 13-1-28 through 13-1-199, imposes civil and criminal penalties for its violation. In addition, New Mexico criminal statutes impose felony penalties for bribes, gratuities, and kickbacks.

18. EQUAL EMPLOYMENT OPPORTUNITY COMPLIANCE

A. The Contractor agrees to abide by all federal, state, and local laws, ordinances, and rules and regulations pertaining to equal employment opportunity and unlawful discrimination. Without in any way limiting the foregoing general obligation, the Contractor specifically agrees not to discriminate against any person with regard to employment with the Contractor or participation in any program or activity offered pursuant to this Agreement on the grounds of race, age, religion, color, national origin, ancestry, sex, physical or mental handicap, serious medical condition, spousal affiliation, sexual orientation, or gender identity.

B. The Contractor acknowledges and agrees that failure to comply with this Section shall constitute a material breach of this Agreement.

19. COMPLIANCE WITH APPLICABLE LAW; CHOICE OF LAW

A. In performing its obligations hereunder, the Contractor shall comply with all applicable laws, ordinances, and regulations.

B. Contractor shall comply with the requirements of Santa Fe County Ordinance 2014-1 (Establishing a Living Wage).

C. This Agreement shall be construed in accordance with the substantive laws of the State of New Mexico, without regard to its choice of law rules. Contractor and the County agree that the exclusive forum for any litigation between them arising out of or related to this Agreement shall be state district courts of New Mexico, located in Santa Fe County.

20. RECORDS AND INSPECTIONS

A. To the extent its books and records relate to (i) its performance of this Agreement or any subcontract entered into pursuant to it or (ii) cost or pricing data (if any) set forth in this Agreement or that was required to be submitted to the County as part of the procurement process, the Contractor agrees to (i) maintain such books and records during the term of this Agreement and for a period of six years from the date of final payment under this Agreement; (ii) allow the County or its designee to audit such books and records at reasonable times and

upon reasonable notice; and (iii) to keep such books and records in accordance with generally accepted accounting principles (GAAP).

B. To the extent its books and records relate to (i) its performance of this Agreement or any subcontract entered into pursuant to it or (ii) cost or pricing data (if any) set forth in this Agreement or that was required to be submitted to County as part of the procurement process, the Contractor also agrees to require any subcontractor it may hire to perform its obligations under this Agreement to (i) maintain such books and records during the term of this Agreement and for a period of six years from the date of final payment under the subcontract; (ii) to allow the County or its designee to audit such books and records at reasonable times and upon reasonable notice; and (iii) to keep such books and records in accordance with GAAP.

21. INDEMNIFICATION

A. The Contractor shall defend, indemnify, and hold harmless the County and its elected officials, agents, and employees from any losses, liabilities, damages, demands, suits, causes of action, judgments, costs or expenses (including but not limited to court costs and attorneys' fees) resulting from or directly or indirectly arising out of the Contractor's performance or non-performance of its obligations under this Agreement, including but not limited to the Contractor's breach of any representation or warranty made herein.

B. The Contractor agrees that the County shall have the right to control and participate in the defense of any such demand, suit, or cause of action concerning matters that relate to the County and that such suit will not be settled without the County's consent, such consent not to be unreasonably withheld. If a conflict exists between the interests of the County and the Contractor in such demand, suit, or cause of action, the County may retain its own counsel to represent the County's interest.

C. The Contractor's obligations under this section shall not be limited by the provisions of any insurance policy the Contractor is required to maintain under this Agreement.

22. SEVERABILITY

If any term or condition of this Agreement shall be held invalid or non-enforceable by any court of competent jurisdiction, the remainder of this Agreement shall not be affected and shall be valid and enforceable to the fullest extent of the law.

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 County:	Santa Fe County
	Attn: Santa Fe County Manager
	102 Grant Avenue
	P.O. Box 276

Santa Fe, New Mexico 87504-0276

To the Contractor: **[CONTRACTOR'S NAME AND ADDRESS]**

24. CONTRACTOR'S REPRESENTATIONS AND WARRANTIES

The Contractor hereby represents and warrants that:

A. This Agreement has been duly authorized by the Contractor, the person executing this Agreement has authority to do so, and, once executed by the Contractor, this Agreement shall constitute a binding obligation of the Contractor.

B. This Agreement and Contractor's obligations hereunder do not conflict with Contractor's corporate agreement or any statement filed with the New Mexico Secretary of State on Contractor's behalf.

C. Contractor is legally registered and is properly licensed by the State of New Mexico to provide the services anticipated by this Agreement and shall maintain such registration and licensure in good standing throughout the duration of the Agreement.

25. FACSIMILE SIGNATURES

The parties hereto agree that a facsimile signature has the same force and effect as an original for all purposes.

26. NO THIRD-PARTY BENEFICIARIES

This Agreement was not intended to and does not create any rights in any persons not a party hereto.

27. INSURANCE

A. General Conditions. The Contractor shall submit evidence of insurance as is required herein. Policies of insurance shall be written by companies authorized to write such insurance in New Mexico.

B. General Liability Insurance, Including Automobile. The Contractor shall procure and maintain during the life of this Agreement a comprehensive general liability and automobile insurance policy with liability limits in amounts not less than \$1,000,000.00 combined single limits of liability for bodily injury, including death, and property damage for any one occurrence. Said policies of insurance shall include coverage for all operations performed for the County by the Contractor; coverage for the use of all owned, non-owned, hired automobiles, vehicles and other equipment, both on and off work; and contractual liability coverage under which this Agreement is an insured contract. Santa Fe County shall be a named additional insured on the policy.

C. Increased Limits. If, during the life of this Agreement, the Legislature of the State of New Mexico increases the maximum limits of liability under the Tort Claims Act (NMSA 1978, Sections 41-4-1 through 41-4-29, as amended), the Contractor shall increase the maximum limits of any insurance required herein.

28. PERMITS, FEES, AND LICENSES

Contractor shall procure all permits and licenses, pay all charges, fees, and royalties, and give all notices necessary and incidental to the due and lawful performance of its obligations hereunder.

29. NEW MEXICO TORT CLAIMS ACT

No provision of this Agreement modifies or waives any sovereign immunity or limitation of liability enjoyed by County or its “public employees” at common law or under the New Mexico Tort Claims Act, NMSA 1978, Section 41-4-1, et seq.

30. CAMPAIGN CONTRIBUTION DISCLOSURE FORM

The Contractor agrees to compute and submit simultaneous with execution of this Agreement a Campaign Contribution Disclosure form approved by the County.

31. APPOINTMENT OF AGENT FOR SERVICE OF PROCESS

The Contractor hereby irrevocably appoints [NAME AND ADDRESS OF AGENT], as its agent upon whom process and writs in any action or proceeding arising out of or related to this Agreement may be served. The Contractor acknowledges and agrees that service upon its designated agent shall have the same effect as though the Contractor were actually and personally served within the state of New Mexico.

32. SURVIVAL

The provisions of following paragraphs shall survive termination of this Contract; INDEMNIFICATION; RECORDS AND INSPECTION; RELEASE, CONFIDENTIALITY, PUBLICATION, REPRODUCTION, AND USE OF MATERIAL; COPYRIGHT; COMPLIANCE WITH APPLICABLE LAW; CHOICE OF LAW; NO THIRD-PARTY BENEFICIARIES; SURVIVAL.

IN WITNESS WHEREOF, the parties have duly executed this Agreement as of the date first written above.

SANTA FE COUNTY

Katherine Miller
County Manager

Date

Approved as to form

Gregory S. Shaffer
County Attorney

Date

Finance Department

Carole H. Jaramillo
Finance Director

Date

CONTRACTOR:

(Signature)

Date

(Print Name)

(Print Title)

APPENDIX E
SAMPLE FORMS & ENVELOPES



GUS MARTINEZ
SANTA FE COUNTY ASSESSOR
P.O. BOX 126
SANTA FE, NM 87504

**OFFICIAL REQUEST
RESPONSE REQUIRED**



PRESORTED
FIRST CLASS MAIL
U.S. POSTAGE PAID
PERMIT No. 3



Gus Martinez
Santa Fe County Assessor

County of Santa Fe Office of the County Assessor

Dear Business Owner,

Enclosed are Business Personal Property declaration forms for the 2016 tax year.

All personal property (e.g. furniture, fixtures, computers, & equipment) owned and used by your business entity is subject to valuation for property taxation purposes pursuant to the New Mexico Property Tax Code Section 7-36-33 NMSA 1978 and the regulation that interprets the statute, NMAC 3.5.6.40.

Please Note: The Business Personal Property Schedules have changed. These changes were made and approved by the New Mexico Property Tax Division. These changes will take effect as of the 2016 tax year.

Personal property reportable to the Assessor is defined by Section 7-36-8B(7) to be tangible property:

- (a) that is used, produced, manufactured, held for sale, leased or maintained by a person for purposes of the persons profession, business, or occupation; and
- (b) for which the owner has claimed a deduction for depreciation for federal income tax purposes during any federal income taxable year occurring in whole or in part during the twelve months immediately preceding the first day of the property tax year.

Excluded from this definition are inventory held for resale, licensed vehicles, leasehold improvements, and supplies.

Every business owner must complete a personal property declaration form each year. The annual form must include additions and deletions of reportable personal property. Even if the business entity has not made any changes reportable for federal income tax purposes, an annual declaration must be submitted to the Assessor. If a business has closed, it must report the cancellation of its personal property tax account to the Assessor.

Declarations are due at the Santa Fe County Assessor's Office by the last day of February 2016. Declarations that are not timely are subject to a statutory penalty.

In order for the annual declaration of personal property to be deemed complete and timely, please adhere to the following:

1. The entire declaration form must be completed, including boxes 2&3 if applicable. The form MUST be signed and dated, as provided for in box 4.
2. The asset listings must be reported on the enclosed itemized rendition report as provided by the Assessor's office. Spreadsheets or alternative formats are only acceptable if accompanied with a completed itemized rendition report. Any deviation may result in errors and processing delays.
3. IRS depreciation schedules and detail must be attached.

Declarations not meeting these requirements will be rejected, returned and deemed untimely.

If you have any questions or require more information, please contact our Business Personal Property Department at 505-995-2777 or email the department at assessor.bpp@santafecountynm.gov.

Thank you,

A handwritten signature in black ink, appearing to read "Gus Martinez".

Gus Martinez
Santa Fe County Assessor

2016 DEPRECIATION SCHEDULES

Schedule 1 6 year life Drilling & Well Service	Schedule 2 10 year life FF&E, Communications, Phone Systems, Vending Machines, Recreation Equip., Residential Furnishings, Motels, Restaurants & Bars, Farm Equip., Hand Tools, All Signs, Heavy Constr. Contractors Equip.	Schedule 3 6 year life Computer Equip., Typewriters, Copiers, Calculators, Fax Machines, Electronic Equip., Cells Phones, TV's	Schedule 4 3 year life Short Term Rentals, VCR's, Video Games etc., Software
2015 93% 2014 78% 2013 64% 2012 49% 2011 34% 2010 20% 2009 13%	2015 96% 2014 87% 2013 78% 2012 69% 2011 61% 2010 52% 2009 43% 2008 34% 2007 26% 2006 17% 2005 13%	2015 93% 2014 78% 2013 64% 2012 49% 2011 34% 2010 20% 2009 13%	2015 85% 2014 56% 2013 27% 2012 13%
Schedule 5 14 year life Manufacturing Equip. of Chemical, Rubber, Metal, Stone, Glass, Steel Mills	Schedule 6 20 year life Wood Billboards	Schedule 7 25 year life Gas & Purification Plants, Pipelines, Oil Field Compressors, Storage	Schedule 8 45 year life Metal Billboards, Bank Vaults
2015 97% 2014 91% 2013 84% 2012 78% 2011 72% 2010 66% 2009 59% 2008 53% 2007 47% 2006 41% 2005 34% 2004 28% 2003 22% 2002 16% 2001 13%	2015 98% 2014 93% 2013 89% 2012 85% 2011 80% 2010 76% 2009 72% 2008 67% 2007 63% 2006 58% 2005 54% 2004 50% 2003 45% 2002 41% 2001 37% 2000 32% 1999 28% 1998 23% 1997 19% 1996 15% 1995 13%	2015 98% 2014 95% 2013 91% 2012 88% 2011 84% 2010 81% 2009 77% 2008 74% 2007 70% 2006 67% 2005 63% 2004 60% 2003 56% 2002 53% 2001 49% 2000 46% 1999 42% 1998 39% 1997 35% 1996 32% 1995 28% 1994 25% 1993 21% 1992 18% 1991 14% 1990 13%	2015 99% 2014 97% 2013 95% 2012 93% 2011 91% 2010 89% 2009 87% 2008 86% 2007 84% 2006 82% 2005 80% 2004 78% 2003 76% 2002 74% 2001 72% 2000 70% 1999 68% 1998 66% 1997 64% 1996 62% 1995 60% 1994 58% 1993 56% 1992 54% 1991 53% 1990 51% 1989 49% 1988 47% 1987 45% 1986 43% 1985 41% 1984 39% 1983 37% 1982 35% 1981 33% 1980 31% 1979 29% 1978 27% 1977 25% 1976 23% 1975 21% 1974 20% 1973 18% 1972 16% 1971 14% 1970 13%

2016 Santa Fe County Business Personal Property Itemized Rendition Report

BPP Acct. #:		Name of Business:				
<div>DO NOT USE NEGATIVE NUMBERS</div> <div>USE WHOLE NUMBERS AND ROUND TO THE NEAREST WHOLE NUMBER</div>						
EQUIPMENT CATEGORY	SCHEDULE # (FROM THE BACK OF FORM)	YEAR OF PURCHASE	ACQUISITION COST	PERCENT GOOD <small>(FROM BACK OF FORM) USE 100% IF SECTION 179</small>	APPLY SEC 179 Y/N	DEPRECIATED COST
Example: Office Furn.	1	2015	250,000	93	No	232,500
TOTAL						

Examples: Acquisition Cost X Percent Good = Depreciated Cost (Full Value) 250,000 X 93% = 232,500
 Depreciated Cost / 3 = Taxable Value 232,500 / 3 = 77,500
 *Section 179 assets must have been acquired/purchased the prior year (2015) to the current tax year (2016) and will be assessed at 100% good.

See back of this page for depreciation/percent good schedules. If you cannot find the appropriate schedule, please contact the Business Personal Property Department.

For your convenience, an electronic fillable version of this form is available online at http://www.santafecountynm.gov/assessor/downloadable_forms.

PLEASE MAKE ADDITIONAL COPIES IF NEEDED TO COMPLETE YOUR ASSET LISTING.

INSTRUCTIONS & INFORMATION

For assistance or questions, contact the personal property department listed on the front of this form.

1. Assets having a deduction for depreciation and/or Section 179 expense which was reported to the IRS for the previous tax year must be reported on this form. See 7-36-8-NMSA-1993 Amended. A copy of the Federal depreciation schedule/detail (179) worksheet **MUST** be attached. (MANDATORY)
2. Depreciation used is a straight line method of calculating the depreciation allowance over the useful life of an asset. The MACRS or ACRS recovery periods cannot be used for New Mexico Property tax valuation purposes.
3. 100% acquisition cost must include freight, installation, and any fees included in the purchase of an asset. Use rounded whole numbers.
4. Owners of rentals or leased housing must report appliances, drapes, furnishings, etc.
5. If leasing equipment, a separate sheet listing the equipment type, and lessor's name, mailing address, and phone number must be attached.
6. Do not report vehicles or trailers licensed in the State of New Mexico.
7. **Note: Corrections submitted after the 30-day protest period as indicated on the Notice of Value will be applied to the next year. If you are not on the tax roll, you will be added to the current tax year under the omitted property guidelines and will be subject to the non-remission penalty.**

Note:

- **This form MUST be completed in accordance with the above listed instructions and returned by the last day of February (Sec. 7-38-8). NO EXTENSIONS GRANTED. All fields must be completed.**
- **All business assets subject to valuation for property tax purposes shall be valued as of January 1 of every year.**
- **A personal property report must be made annually even if no changes have been made. Failure to report may result in a 5% non-remission penalty.**
- **Falsification of a report may result in penalties up to 25% (Sec. 7-38-8).**
- **All returns are subject to field audits.**

Box 4 – AFFIRMATION (MANDATORY)

I do solemnly affirm to the best of my knowledge that the statements on this form completed and signed by me and the preceding list and description are full and correct statements of all business personal property required to be reported pursuant to Section 7-38-8 of the Property Tax Code, in this County on January 1st, and all statements required to be made under the Property Tax code, and I so affirm under penalties of perjury.

Signature of Owner/Authorized Agent

Date



**Office of the Santa Fe County Assessor
c/o Business Personal Property**

P.O. Box 126
Santa Fe, NM 87504-0126
(505) 995-2777 • Fax (505) 986-6316
assessor.bpp@santafecountynm.gov

Gus Martinez
Santa Fe County Assessor

**BUSINESS PERSONAL PROPERTY DECLARATION 2016
DUE DATE: FEBRUARY 28, 2016**

OFFICIAL MAIL DATE:

**Business Mailing Address
Change or Correction
(if different from above)**

Address _____
City _____ State _____ Zip _____

(If reporting for more than one school district, a separate form is required to be filled out for each)

This form is for reporting Business Personal Property and Farm Equipment for property tax purposes. Only business assets and equipment for which an owner has claimed a deduction for depreciation for federal income tax purposes is subject to valuation. Please read instructions on the back of this form.

COMPLETE THE FOLLOWING IF APPLICABLE

- Box 1 – Business information for active businesses- must be filled out.
Box 2 – Transfer of ownership if business has been sold, or if business was closed.
Box 3 – Signature of owner when assets are no longer being reported for income tax purposes.
Box 4 – Signature required, affirming that all information listed on this form is true and correct, see back.

SEE BACK FOR MORE INSTRUCTIONS

1 – BUSINESS INFORMATION

Name of business owner _____ Business start date _____
Mailing Address (of business owner) _____ Phone # _____
Physical Location Address of Business _____ Business Id/ License # _____
_____ Contact Person(name) _____
Assessor's BPP Acct. # _____ Contact Person Phone # _____
Type of Business _____ Fax# _____
(ie.: Retail, Oil & gas, fast food, restaurant, hair salon, construction, etc.)

2 – TRANSFER OF OWNERSHIP OR BUSINESS CLOSING

Name of Buyer _____ Phone # _____
Mailing Address _____ Date of Closing or Sale *(please circle which):* _____
City, State, Zip _____
Signature _____ Date _____

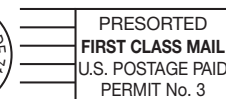
3 – ACTIVE BUSINESS NO LONGER DEPRECIATING ASSETS

_____ possesses no business personal property for which the owner has claimed a deduction for depreciation for federal income tax purposes during any federal income taxable year occurring in whole or in part during twelve months immediately preceding the first day of the property tax year (January 1).

Signature of Owner/Agent _____ Date _____



GUS MARTINEZ
SANTA FE COUNTY ASSESSOR
P.O. BOX 126
SANTA FE, NM 87504



Fair & Equitable Assessments For All!

Please read the enclosed **important** information. You may **QUALIFY** for a:

- Valuation Freeze (65 yrs. & Older)
- Head-of-Family Exemption
- Veteran's Exemptions
- Agricultural/Grazing Valuation

Follow us
@sfc_assessor





GUS MARTINEZ
SANTA FE COUNTY ASSESSOR
P.O. BOX 126
SANTA FE, NM 87504



PRESORTED
FIRST CLASS MAIL
U.S. POSTAGE PAID
PERMIT No. 3

Please read the enclosed important information.

Fair & Equitable Assessments for All!

Follow us
@sfc_assessor



Peregrine Services, Inc. — Phone: 318-325-4762 • Fax: 318-325-0992 • e-mail: psi@peregrinesolutions.com



2016 NOTICE OF VALUE

GUS MARTINEZ

SANTA FE COUNTY ASSESSOR

P.O. BOX 126 • SANTA FE, NM 87504
Phone (505) 986-6300 • Fax # (505) 986-6316

E-mail: assessor@santafecountynm.gov

Website: www.santafecountynm.gov/assessor

Property listed and valued as of January 1, 2016

THIS IS NOT A TAX BILL

This is the only notice of value you will receive unless you are the owner of personal property or taxable livestock.

Location ID

Official Mailing Date

Protest Deadline

Key Code

INSTRUCTIONS FOR PROTESTING AND FILING OF EXEMPTIONS ARE ON THE REVERSE SIDE.
FOR ASSISTANCE, CALL (505) 986-6300, BETWEEN THE HOURS OF 8:00 AM - 5:00 PM MONDAY - FRIDAY.

▼ NET TAXABLE VALUES WILL BE ALLOCATED TO GOVERNMENTAL UNITS IN SCHOOL DISTRICT

ALWAYS USE LOCATION ID AS REFERENCE

School District

UPC #

Property Use

Location Address

Property Legal Description

2015 (Last Year's) Property Value Information These values reflect analysis of 2014 market value

Full Value - Land: \$
Agricultural Land: \$
Full Value - Structures: \$
Total Full Value: \$
Taxable Value: (1/3 of Full Value) \$
Head of Family Exemption \$
Veteran's Exemption: \$
Net Taxable Value: \$
Value Freeze:
Disabled Veterans Exemption :

2015 Tax Rate \$
2015 Tax Amount: \$

2016 (This Year's) Property Value Information These values reflect analysis of 2015 market value

Full Value - Land: \$
Agricultural Land: \$
Full Value - Structures: \$
Total Full Value: \$
Taxable Value: (1/3 of Full Value) \$
Head of Family Exemption \$
Veteran's Exemption: \$
Net Taxable Value: \$
Value Freeze:
Disabled Veterans Exemption :

*2016 Estimated Tax Rate
*2016 **Estimated** Tax Amount \$

- * Disclaimer: The calculation of (the estimated) property tax may be higher or lower than the property tax that will actually be imposed.
- * The "2016 Estimated Tax Amount" is calculated by multiplying the "Net Taxable Value" by the "2016 Estimated Tax Rate".
- * The "2016 Estimated Tax Rate" is equal to the 2015 Tax Rate, unless the property has changed in use from residential to non-residential or vice-versa. Tax rates for the current year will be determined in September by the New Mexico Department of Finance and Administration.

This document constitutes a property owner's notice of valuation as required under section 7-38-20 of the New Mexico Property Tax Code.

Retain this portion for your records.

"Full Value" means the value determined for property taxation purposes. "Taxable value" is 33 1/3% of "Full Value". "Net Taxable Value" is "Taxable Value" less exemptions and is the value upon which tax is imposed.

↑ TO DETACH, TEAR ALONG PERFORATION

RETURN THIS PORTION TO THE ASSESSOR'S OFFICE IF APPLICABLE. SEE INSTRUCTIONS ON BACK.

Location ID

HEAD OF FAMILY EXEMPTION (No need to sign and send in if you are already receiving the exemption, verify in exemptions line above)

I hereby certify that I am a resident of New Mexico as of January 1 of this year and the "head of family" as that term is defined in Section 7-37-4 of the Property Tax Code, and I hereby claim the exemption from the taxable value of the property provided by Section 7-37-4 of the Property Tax Code. I certify that the above information is true and correct and that this exemption is not being claimed in any other county.

Head of Family (Sign Here): x _____ (A)

AFFIRMATION

I do solemnly affirm to the best of my knowledge that the statements on this form completed and signed by me and the preceding list and description are full and correct statements of all property required to be reported pursuant to Section 7-38-8 of the Property Tax Code in this county on January 1 and all statements required to be made under the Property Tax Code, and I so affirm under pains and penalties of perjury.

Affirmed before me this _____ day of _____, 2016.

x _____ (B) _____ Assessor or Assessor's Employee
Property Owner or Authorized Agent (sign here)



2016 NOTICE OF VALUE

GUS MARTINEZ

SANTA FE COUNTY ASSESSOR

P.O. BOX 126 • SANTA FE, NM 87504
Phone (505) 995-6511 • Fax # (505) 986-6316

E-mail: assessor@santafecountynm.gov

Website: www.santafecountynm.gov/assessor

Property listed and valued as of January 1, 2016

THIS IS NOT A TAX BILL

This is the only notice of value you will receive unless you are the owner of personal property or taxable livestock.

Location ID

Official Mailing Date

Protest Deadline

Key Code

INSTRUCTIONS FOR PROTESTING AND FILING OF EXEMPTIONS ARE ON THE REVERSE SIDE.
FOR ASSISTANCE, CALL (505) 986-6300, BETWEEN THE HOURS OF 8:00 AM - 5:00 PM MONDAY - FRIDAY.

▼ NET TAXABLE VALUES WILL BE ALLOCATED TO GOVERNMENTAL UNITS IN SCHOOL DISTRICT

ALWAYS USE LOCATION ID AS REFERENCE

School District

UPC #

Property Use

Location Address

Property Legal Description

2015 (Last Year's) Property Value Information These values reflect analysis of 2014 market value

Full Value - Manufactured Homes

\$

Taxable Value: (1/3 of Full Value)

\$

Head of Family Exemption

\$

Veteran's Exemption:

\$

Net Taxable Value:

\$

Value Freeze:

Disabled Veterans Exemption :

2015 Tax Rate

\$

2015 Tax Amount:

\$

2016 (This Year's) Property Value Information These values reflect analysis of 2015 market value

Full Value - Manufactured Homes

\$

Taxable Value: (1/3 of Full Value)

\$

Head of Family Exemption

\$

Veteran's Exemption:

\$

Net Taxable Value:

\$

Value Freeze:

Disabled Veterans Exemption :

*2016 Estimated Tax Rate

*2016 Estimated Tax Amount

\$

* Disclaimer: The calculation of (the estimated) property tax may be higher or lower than the property tax that will actually be imposed.

* The "2016 Estimated Tax Amount" is calculated by multiplying the "Net Taxable Value" by the "2016 Estimated Tax Rate".

* The "2016 Estimated Tax Rate" is equal to the 2015 Tax Rate, unless the property has changed in use from residential to non-residential or vice-versa. Tax rates for the current year will be determined in September by the New Mexico Department of Finance and Administration.

This document constitutes a property owner's notice of valuation as required under section 7-38-20 of the New Mexico Property Tax Code.

Retain this portion for your records.

"Full Value" means the value determined for property taxation purposes. "Taxable value" is 33 1/3% of "Full Value." "Net Taxable Value" is "Taxable Value" less exemptions and is the value upon which tax is imposed.

↑ TO DETACH, TEAR ALONG PERFORATION

RETURN THIS PORTION TO THE ASSESSOR'S OFFICE IF APPLICABLE. SEE INSTRUCTIONS ON BACK.

Location ID

HEAD OF FAMILY EXEMPTION (No need to sign and send in if you are already receiving the exemption, verify in exemptions line above)

I hereby certify that I am a resident of New Mexico as of January 1 of this year and the "head of family" as that term is defined in Section 7-37-4 of the Property Tax Code, and I hereby claim the exemption from the taxable value of the property provided by Section 7-37-4 of the Property Tax Code. I certify that the above information is true and correct and that this exemption is not being claimed in any other county.

Head of Family (Sign Here): x _____ (A)

AFFIRMATION

I do solemnly affirm to the best of my knowledge that the statements on this form completed and signed by me and the preceding list and description are full and correct statements of all property required to be reported pursuant to Section 7-38-8 of the Property Tax Code in this county on January 1 and all statements required to be made under the Property Tax Code, and I so affirm under pains and penalties of perjury.

Affirmed before me this _____ day of _____, 2016.

x _____ (B) _____ Assessor or Assessor's Employee
Property Owner or Authorized Agent (sign here)



2016 NOTICE OF VALUE

GUS MARTINEZ

SANTA FE COUNTY ASSESSOR

P.O. BOX 126 • SANTA FE, NM 87504

Phone (505) 986-6300 • Fax # (505) 986-6316

E-mail: assessor@santafecountynm.gov

Website: www.santafecountynm.gov/assessor

Property listed and valued as of January 1, 2016

THIS IS NOT A TAX BILL

This is the only notice of value you will receive unless you are the owner of real property.

Tax Account ID

Official Mailing Date

Protest Deadline

Key Code

INSTRUCTIONS FOR PROTESTING AND FILING OF EXEMPTIONS ARE ON THE REVERSE SIDE.
FOR ASSISTANCE, CALL (505) 986-6300, BETWEEN THE HOURS OF 8:00 AM - 5:00 PM MONDAY - FRIDAY.

▼ NET TAXABLE VALUES WILL BE ALLOCATED TO GOVERNMENTAL UNITS IN SCHOOL DISTRICT

ALWAYS USE TAX ACCOUNT ID AS REFERENCE

School District	UPC #	Property Use
Location Address		
Property Legal Description		
2015 (Last Year's) Property Value Information These values reflect analysis of 2014 market value		2016 (This Year's) Property Value Information These values reflect analysis of 2015 market value
Full Value – Bus. Personal Property:	\$	Full Value – Bus. Personal Property: \$
Full Value – Livestock:	\$	Full Value – Livestock: \$
Total Full Value:	\$	Total Full Value: \$
Net Taxable Value: (1/3 of full value)	\$	Net Taxable Value: (1/3 of full value) \$
2015 Tax Rate	\$	*2016 Estimated Tax Rate
2015 Tax Amount:	\$	*2016 Estimated Tax Amount \$

* Disclaimer: The calculation of (the estimated) property tax may be higher or lower than the property tax that will actually be imposed.

* The "2016 Estimated Tax Amount" is calculated by multiplying the "Net Taxable Value" by the "2016 Estimated Tax Rate".

* The "2016 Estimated Tax Rate" is equal to the 2015 Tax Rate, unless the property has changed in use from residential to non-residential or vice-versa. Tax rates for the current year will be determined in September by the New Mexico Department of Finance and Administration.

This document constitutes a property owner's notice of valuation as required under section 7-38-20 of the New Mexico Property Tax Code.

Retain this portion for your records.

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↑ TO DETACH, TEAR ALONG PERFORATION ↑

RETURN THIS PORTION TO THE ASSESSOR'S OFFICE IF APPLICABLE.
SEE INSTRUCTIONS ON BACK.

Tax Account ID

FOR MAILING ADDRESS CHANGE COMPLETE THE FOLLOWING BELOW, SIGN AND RETURN TO ASSESSOR

CORRECT MAILING ADDRESS

NAME:		
MAILING ADDRESS:		
CITY:	STATE:	ZIP CODE:
TELEPHONE	HOME:	WORK:

SIGNATURE OF OWNER OR OWNER'S AUTHORIZED AGENT

X

DATE

/ /



2016 NOTICE OF VALUE

GUS MARTINEZ

SANTA FE COUNTY ASSESSOR

P.O. BOX 126 • SANTA FE, NM 87504
Phone (505) 986-6300 • Fax # (505) 986-6316

E-mail: assessor@santafecountynm.gov

Website: www.santafecountynm.gov/assessor

Property listed and valued as of January 1, 2016

THIS IS NOT A TAX BILL

This is the only notice of value you will receive unless you are the owner of personal property or taxable livestock.

Location ID

Official Mailing Date

Protest Deadline

Key Code

INSTRUCTIONS FOR PROTESTING AND FILING OF EXEMPTIONS ARE ON THE REVERSE SIDE.
FOR ASSISTANCE, CALL (505) 986-6300, BETWEEN THE HOURS OF 8:00 AM - 5:00 PM MONDAY - FRIDAY.

▼ NET TAXABLE VALUES WILL BE ALLOCATED TO GOVERNMENTAL UNITS IN SCHOOL DISTRICT

ALWAYS USE LOCATION ID AS REFERENCE

School District

UPC #

Property Use

Location Address

Property Legal Description

2015 (Last Year's) Property Value Information These values reflect analysis of 2014 market value

Full Value - Land: \$
Agricultural Land: \$
Full Value - Structures: \$
Total Full Value: \$
Taxable Value: (1/3 of Full Value) \$
Head of Family Exemption \$
Veteran's Exemption: \$
Net Taxable Value: \$
Value Freeze:
Disabled Veterans Exemption :

2015 Tax Rate \$
2015 Tax Amount: \$

2016 (This Year's) Property Value Information These values reflect analysis of 2015 market value

Full Value - Land: \$
Agricultural Land: \$
Full Value - Structures: \$
Total Full Value: \$
Taxable Value: (1/3 of Full Value) \$
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Net Taxable Value: \$
Value Freeze:
Disabled Veterans Exemption :

*2016 Estimated Tax Rate
*2016 **Estimated** Tax Amount \$

* Disclaimer: The calculation of (the estimated) property tax may be higher or lower than the property tax that will actually be imposed.
* The "2016 Estimated Tax Amount" is calculated by multiplying the "Net Taxable Value" by the "2016 Estimated Tax Rate".
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This document constitutes a property owner's notice of valuation as required under section 7-38-20 of the New Mexico Property Tax Code.

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↑ TO DETACH, TEAR ALONG PERFORATION

RETURN THIS PORTION TO THE ASSESSOR'S OFFICE IF APPLICABLE. SEE INSTRUCTIONS ON BACK.

Location ID

HEAD OF FAMILY EXEMPTION (No need to sign and send in if you are already receiving the exemption, verify in exemptions line above)

I hereby certify that I am a resident of New Mexico as of January 1 of this year and the "head of family" as that term is defined in Section 7-37-4 of the Property Tax Code, and I hereby claim the exemption from the taxable value of the property provided by Section 7-37-4 of the Property Tax Code. I certify that the above information is true and correct and that this exemption is not being claimed in any other county.

Head of Family (Sign Here): x _____ (A)

AFFIRMATION

I do solemnly affirm to the best of my knowledge that the statements on this form completed and signed by me and the preceding list and description are full and correct statements of all property required to be reported pursuant to Section 7-38-8 of the Property Tax Code in this county on January 1 and all statements required to be made under the Property Tax Code, and I so affirm under pains and penalties of perjury.

Affirmed before me this _____ day of _____, 2016.

x _____ (B) _____ Assessor or Assessor's Employee
Property Owner or Authorized Agent (sign here)

GENERAL INSTRUCTIONS
INFORMACION GENERAL- Por favor llame 505-986-6300 o consultar en persona para ayuda en español.

- REPORT TO ASSESSOR'S OFFICE IF YOU:
- 1) Disagree with the valuation and want to file a protest
 - 2) Need to claim Head of family or Veteran exemptions
 - 3) Own a mobile / manufactured home
 - 4) Are declaring property as agricultural for the first time
 - 5) Are requesting a church or charitable / educational exemption
 - 6) Are 65 or older or 100% disabled w/ income of \$32,000 or less

1. Protesting Valuation: (NMSA 7-38-24) Property owners may protest the value or classification determined by the county assessor for their property for property taxation purposes, the assessor's allocation of value of his property to a particular governmental unit or denial of a claim for an exemption or for a limitation on increase in value by filing a petition with the assessor.

2. LIMITATION ON INCREASE IN VALUE FOR SINGLE-FAMILY DWELLINGS OCCUPIED BY LOW-INCOME OWNERS SIXTY-FIVE YEARS OF AGE OR OLDER OR DISABLED: (NMSA 7-36-21.3) Certain NM residents who own and occupy a single-family dwelling may be eligible for a freeze of their taxable value. The application is for the current year only and is based on the previous year's income.

3. EXEMPTION CLAIMING: (NMSA 7-38-17) All exemptions must be applied for no later than 30 days after the mailing of the county assessor's notice of valuation, pursuant to Section 7-38-20 NMSA 1978, in order for it to be allowed for that tax year.

- A. HEAD-OF-FAMILY: (NMSA 7-37-4) This exemption is a \$2,000 reduction in the taxable value of residential property, and may be claimed by any New Mexico resident for his or her residence.
- B. VETERAN AND DISABLED VETERAN EXEMPTION: (NMSA 7-37-5 & 7-37-5.1) The veteran's exemption is a \$4,000 reduction in your taxable value.

TO ALL VETERANS AND UNMARRIED SURVIVING SPOUSE OF VETERANS: The state constitution was amended in November 2004 to expand the eligibility requirements to all veterans who may be eligible for the veteran exemption.

- C. CHURCH: 7-36-7 (3.6.5.15L) To qualify for this exemption, the substantial and primary use of the property must be for religious purposes.
- D. CHARITABLE / EDUCATIONAL: NMSA 7-36-7 (3.6.5.15K) To qualify for these exemptions, the substantial and primary use of the property must be for charitable / educational purposes.

4. MANUFACTURED HOMES: (NMSA 7-36-26) The owner of a manufactured home subject to valuation for property taxation purposes shall report the manufactured home annually for valuation to the assessor of the county in which the manufactured home is located on January 1 of the current tax year.

5. AGRICULTURAL USE CLAIM: (NMSA 7-36-20) If you wish to declare your property as land used primarily for agricultural purposes, resulting in a special method of valuation (below market value), applications for agricultural lands must be submitted no later than thirty (30) days after the mailing of the County Assessor's Notice of Values.

Should you have questions about this form or need any assistance with any other property valuation issues, I encourage you to call us or visit with our staff in person. Our address and phone number are listed on the front page of this notice. Several applications, forms, and more information are also available on our website at: www.santafecountynm.gov/assessor.

Gus Martinez, County Assessor

EVERY ATTEMPT IS MADE TO HAVE A CORRECT AND CURRENTLY ASSESSED OWNER ON OUR RECORDS. IF ANY CHANGES HAVE OCCURED, PLEASE FILL OUT THE INFORMATION BELOW. ALL CHANGES REQUIRE A SIGNATURE.

Any improvements or new construction to your property not listed on this notice of value must be reported to the assessor's office for valuation.

FOR AN ADDRESS CHANGE OR OWNERSHIP CHANGE, COMPLETE THE FOLLOWING AND SIGN

PLEASE PRINT CORRECT NAME AND MAILING ADDRESS

OWNER NAME:

MAILING ADDRESS:

CITY STATE: ZIP CODE:

TELEPHONE HOME: WORK:

OWNERSHIP CHANGE REQUIRES A COPY OF THE DEED

SITUS ADDRESS SALES PRICE: \$

DOCUMENT BOOK NO. PAGE NO. SALES DATE: / /

SIGNATURE OF OWNER OR OWNER'S AUTHORIZED AGENT DATE: / /

PROPERTY CHANGE DECLARATION

If there has been a change to the status of your land or building, please check.

NEW PROPERTY USE: RESIDENTIAL

REMOVED COMMERCIAL

ADDITION/REMODEL OTHER

MANUFACTURED HOMES

GUS MARTINEZ

SANTA FE COUNTY ASSESSOR

P.O. BOX 126

SANTA FE, NM 87504-0126

Phone (505) 986-6300

Main Fax Line (505) 986-6316

PLEASE RETURN TO OUR OFFICE AT ADDRESS LISTED ABOVE

GENERAL INSTRUCTIONS
INFORMACION GENERAL- Por favor llame 505-986-6300 o consultar en persona para ayuda en español.

- REPORT TO ASSESSOR'S OFFICE IF YOU:
- 1) Disagree with the valuation and want to file a protest
 - 2) Need to claim Head of family or Veteran exemptions
 - 3) Own a mobile / manufactured home
 - 4) Are declaring property as agricultural for the first time
 - 5) Are requesting a church or charitable / educational exemption
 - 6) Are 65 or older or 100% disabled w/ income of \$32,000 or less

1. Protesting Valuation: (NMSA 7-38-24) Property owners may protest the value or classification determined by the county assessor for their property for property taxation purposes, the assessor's allocation of value of his property to a particular governmental unit or denial of a claim for an exemption or for a limitation on increase in value by filing a petition with the assessor.

2. LIMITATION ON INCREASE IN VALUE FOR SINGLE-FAMILY DWELLINGS OCCUPIED BY LOW-INCOME OWNERS SIXTY-FIVE YEARS OF AGE OR OLDER OR DISABLED: (NMSA 7-36-21.3) Certain NM residents who own and occupy a single-family dwelling may be eligible for a freeze of their taxable value. The application is for the current year only and is based on the previous year's income.

3. EXEMPTION CLAIMING: (NMSA 7-38-17) All exemptions must be applied for no later than 30 days after the mailing of the county assessor's notice of valuation, pursuant to Section 7-38-20 NMSA 1978, in order for it to be allowed for that tax year.

- A. HEAD-OF-FAMILY: (NMSA 7-37-4) This exemption is a \$2,000 reduction in the taxable value of residential property, and may be claimed by any New Mexico resident for his or her residence.
- B. VETERAN AND DISABLED VETERAN EXEMPTION: (NMSA 7-37-5 & 7-37-5.1) The veteran's exemption is a \$4,000 reduction in your taxable value.

TO ALL VETERANS AND UNMARRIED SURVIVING SPOUSE OF VETERANS: The state constitution was amended in November 2004 to expand the eligibility requirements to all veterans who may be eligible for the veteran exemption.

- C. CHURCH: 7-36-7 (3.6.5.15L) To qualify for this exemption, the substantial and primary use of the property must be for religious purposes.
- D. CHARITABLE / EDUCATIONAL: NMSA 7-36-7 (3.6.5.15K) To qualify for these exemptions, the substantial and primary use of the property must be for charitable / educational purposes.

4. MANUFACTURED HOMES: (NMSA 7-36-26) The owner of a manufactured home subject to valuation for property taxation purposes shall report the manufactured home annually for valuation to the assessor of the county in which the manufactured home is located on January 1 of the current tax year.

5. AGRICULTURAL USE CLAIM: (NMSA 7-36-20) If you wish to declare your property as land used primarily for agricultural purposes, resulting in a special method of valuation (below market value), applications for agricultural lands must be submitted no later than thirty (30) days after the mailing of the County Assessor's Notice of Values.

Should you have questions about this form or need any assistance with any other property valuation issues, I encourage you to call us or visit with our staff in person. Our address and phone number are listed on the front page of this notice. Several applications, forms, and more information are also available on our website at: www.santafecountynm.gov/assessor.

Gus Martinez, County Assessor

EVERY ATTEMPT IS MADE TO HAVE A CORRECT AND CURRENTLY ASSESSED OWNER ON OUR RECORDS. IF ANY CHANGES HAVE OCCURED, PLEASE FILL OUT THE INFORMATION BELOW. ALL CHANGES REQUIRE A SIGNATURE.

Any improvements or new construction to your property not listed on this notice of value must be reported to the assessor's office for valuation.

FOR AN ADDRESS CHANGE OR OWNERSHIP CHANGE, COMPLETE THE FOLLOWING AND SIGN

PLEASE PRINT CORRECT NAME AND MAILING ADDRESS

OWNER NAME:

MAILING ADDRESS:

CITY STATE: ZIP CODE:

TELEPHONE HOME: WORK:

OWNERSHIP CHANGE REQUIRES A COPY OF THE DEED

SITE ADDRESS SALES PRICE: \$

DOCUMENT BOOK NO. PAGE NO. SALES DATE: / /

SIGNATURE OF OWNER OR OWNER'S AUTHORIZED AGENT DATE: / /

PROPERTY CHANGE DECLARATION

If there has been a change to the status of your land or building, please check.

NEW RESIDENTIAL

REMOVED COMMERCIAL

ADDITION/REMODEL OTHER

MANUFACTURED HOMES

GUS MARTINEZ

SANTA FE COUNTY ASSESSOR

P.O. BOX 126

SANTA FE, NM 87504-0126

Phone (505) 986-6300

Main Fax Line (505) 986-6316

PLEASE RETURN TO OUR OFFICE AT ADDRESS LISTED ABOVE

GENERAL INSTRUCTIONS

INFORMACION GENERAL

Por favor llame 505-986-6300 o consultar en persona para ayuda en español.

Protesting Valuation: (NMSA 7-38-24) Property owner may protest the value or classification determined by the county assessor for their property for property taxation purposes, the assessor's allocation of value of his property to a particular governmental unit with the assessor. **Petitions of protest are required to be filed with the county assessor no later than 30 days after the mailing date of the Notice of Value as indicated on the front of this form.**

All business assets and farm equipment subject to valuation for property tax purposes shall be valued as of January 1 (NMSA 7-38-7) of every year, (NMSA 7-36-8; 7-36-33).

Note: Corrections submitted after the protest deadline as indicated on this form will be applied to the next year. Property not listed on the county tax roll will be added to the current tax year under the omitted property regulations in accordance with NMSA 7-38-76, and will be subject to a nonrendition penalty, NMSA 7-38-8-H.

Should you have questions about this form or need any assistance with any other property valuation issues, I encourage you to call us or visit with our staff in person. Our address and phone number is listed on the front page of this notice. Several applications, forms, and more information are also available on our website at: www.santafecountynm.gov/assessor.



Gus Martinez, County Assessor

GENERAL INSTRUCTIONS
INFORMACION GENERAL- Por favor llame 505-986-6300 o consultar en persona para ayuda en español.

REPORT TO ASSESSOR'S OFFICE IF YOU:

- 1) Disagree with the valuation and want to file a protest (see line 1 below)
- 2) Need to claim Head of family or Veteran exemptions (see line 3 A&B below)
- 3) Own a mobile / manufactured home (see line 4 below)
- 4) Are declaring property as agricultural for the first time (see line 5 below)
- 5) Are requesting a church or charitable / educational exemption (see line 3 C&D below)
- 6) Are 65 or older or 100% disabled w/ income of \$32,000 or less (see line 2 below)

1. Protesting Valuation: (NMSA 7-38-24) Property owners may protest the value or classification determined by the county assessor for their property for property taxation purposes, the assessor's allocation of value of his property to a particular governmental unit or denial of a claim for an exemption or for a limitation on increase in value by filing a petition with the assessor. Petitions of protest are required to be filed with the county assessor no later than 30 days after the mailing date of the Notice of Value as indicated on the front of this form.

2. LIMITATION ON INCREASE IN VALUE FOR SINGLE-FAMILY DWELLINGS OCCUPIED BY LOW-INCOME OWNERS SIXTY-FIVE YEARS OF AGE OR OLDER OR DISABLED: (NMSA 7-36-21.3) Certain NM residents who own and occupy a single-family dwelling may be eligible for a freeze of their taxable value. The application is for the current year only and is based on the previous year's income. To qualify, the previous year's modified gross household income must be \$32,000 per year or less and the applicant must be either disabled or 65 years of age in the year in which the application is made. Modified gross income means all household income, undiminished by losses from whatever source derived. Application must be submitted no later than 30 days after the mailing date indicated on this form. Proof of age or disability, and income must be presented with application. Applications are available at the assessor's office or on our website at www.santafecountynm.gov/assessor. An owner who has claimed and been allowed the limitation of value for the three consecutive tax years immediately prior to the 2016 tax year need not claim the limitation for subsequent tax years if there is no change in eligibility. The Assessor will continue to apply the limitation automatically until a change in eligibility occurs and is reported by the owner.

3. EXEMPTION CLAIMING: (NMSA 7-38-17) All exemptions must be applied for no later than 30 days after the mailing of the county assessor's notice of valuation, pursuant to Section 7-38-20 NMSA 1978, in order for it to be allowed for that tax year.

- A. HEAD-OF-FAMILY: (NMSA 7-37-4) This exemption is a \$2,000 reduction in the taxable value of residential property, and may be claimed by any New Mexico resident for his or her residence. Only one exemption may be claimed for any tax year per household. This exemption can be claimed in person or by signing lines A & B on the front of this form and mailing that portion back to the assessor's office. Keep the top portion for your records. You do not need to sign and return this form if you are already receiving the exemption. See "EXEMPTIONS" on front.
- B. VETERAN AND DISABLED VETERAN EXEMPTION: (NMSA 7-37-5 & 7-37-5.1) The veteran's exemption is a \$4,000 reduction in your taxable value. The disabled veteran's exemption is a 100% exemption from property taxes. Both may be claimed by any honorably discharged veteran. Eligibility is determined by the New Mexico Department of Veteran's Services. Once qualified, you must present a certificate of eligibility to the assessor's office in person for confirmation of exemption declaration. Once the exemption is claimed and allowed, it shall apply to subsequent years as long as there is no change in eligibility or ownership status. If you have claimed the exemption with the Motor Vehicle Division, you must come into the assessor's office and report it, as only the remaining portion of the exemption will be allowed. You do not need to sign and return the form if you are already receiving the exemption. See "EXEMPTIONS" on front.

TO ALL VETERANS AND UNMARRIED SURVIVING SPOUSE OF VETERANS: The state constitution was amended in November 2004 to expand the eligibility requirements to all veterans who may be eligible for the veteran exemption. Call the Department of Veteran Services: Toll Free (866) 433-8387 or locally at (505) 827-6300 with eligibility questions.

- C. CHURCH: 7-36-7 (3.6.5.15L) To qualify for this exemption, the substantial and primary use of the property must be for religious purposes. Application must be submitted on a form provided by the assessor's office.
- D. CHARITABLE / EDUCATIONAL: NMSA 7-36-7 (3.6.5.15K) To qualify for these exemptions, the substantial and primary use of the property must be for charitable / educational purposes. Application must be submitted on a form provided by the assessor's office.

4. MANUFACTURED HOMES: (NMSA 7-36-26) The owner of a manufactured home subject to valuation for property taxation purposes shall report the manufactured home annually for valuation to the assessor of the county in which the manufactured home is located on January 1 of the current tax year. The report shall be in a form and contain the information required by department regulation and shall be made no later than the last day of February of the tax year in which the property is subject to valuation.

5. AGRICULTURAL USE CLAIM: (NMSA 7-36-20) If you wish to declare your property as land used primarily for agricultural purposes, resulting in a special method of valuation (below market value), applications for agricultural lands must be submitted no later than thirty (30) days after the mailing of the County Assessor's Notice of Values. If you were granted the special method of valuation the preceding year, you are not required to reapply as long as the status and use does not change. When the owner of the land has not reported that the use of the land is no longer primarily used for agricultural purposes but the county assessor has evidence sufficient to rebut the presumptions in Subsection A of Section 7-36-20, the county assessor must change the classification of the land. In such a case the county assessor must also consider whether the penalty provided by Subsection H should be applied. The owner may protest the change in classification.

Should you have questions about this form or need any assistance with any other property valuation issues, I encourage you to call us or visit with our staff in person. Our address and phone number are listed on the front page of this notice. Several applications, forms, and more information are also available on our website at: www.santafecountynm.gov/assessor.

Gus Martinez, County Assessor

EVERY ATTEMPT IS MADE TO HAVE A CORRECT AND CURRENTLY ASSESSED OWNER ON OUR RECORDS. IF ANY CHANGES HAVE OCCURRED, PLEASE FILL OUT THE INFORMATION BELOW. ALL CHANGES REQUIRE A SIGNATURE. Any improvements or new construction to your property not listed on this notice of value must be reported to the assessor's office for valuation.

FOR AN ADDRESS CHANGE OR OWNERSHIP CHANGE, COMPLETE THE FOLLOWING AND SIGN

PLEASE PRINT CORRECT NAME AND MAILING ADDRESS

OWNER NAME:

MAILING ADDRESS:

CITY STATE: ZIP CODE:

TELEPHONE HOME: WORK:

OWNERSHIP CHANGE REQUIRES A COPY OF THE DEED

LOCATION ADDRESS SALES PRICE:

DOCUMENT BOOK NO. PAGE NO. SALES DATE:

SIGNATURE OF OWNER OR OWNER'S AUTHORIZED AGENT DATE:

PROPERTY CHANGE DECLARATION

If there has been a change to the status of your land or building, please check.

NEW PROPERTY USE:

RESIDENTIAL

COMMERCIAL

OTHER

GUS MARTINEZ

SANTA FE COUNTY ASSESSOR

P.O. BOX 126

SANTA FE, NM 87504-0126

Phone (505) 986-6300

Main Fax Line (505) 986-6316

PLEASE RETURN TO OUR OFFICE AT ADDRESS LISTED ABOVE