

Justin S. Greene
Commissioner, District 1

Lisa Cacari Stone
Commissioner, District 2

Camilla Bustamante
Commissioner, District 3



Adam Fulton Johnson
Commissioner, District 4

Hank Hughes
Commissioner, District 5

Gregory S. Shaffer
County Manager

Date: June 16, 2025

TO: Procurement File

FROM: Bill Taylor, Procurement Manager *BT*

RE: **Sole Source Determination Pursuant to Section 13-1-126 NMSA 1978 for the Provision of Providing Professional Services Contract with Ecotone Landscape Planning, LLC to Develop an Updated Management Plan for the San Pedro Open Space Properties**

BACKGROUND

In May 2015, Santa Fe County entered into Agreement No. 2015-0183-GM with Ecotone for the creation of a site specific Strategic Management Plan for three open space properties within the San Pedro Open Space in accordance with the County Sustainable Growth Management Plan.

Santa Fe County owns the 320-acre San Pedro Open Space near Golden, NM. Santa Fe County acquired the southern 160-acre parcel in 2011. A management plan was then created for this property in 2016. In 2024, Santa Fe County acquired two northern parcels, totaling 160 acres, doubling the size of the open space to 320 acres. It is necessary to update the management plan to account for these additional parcels, and to plan trails and other recreational amenities on the expanded open space property.

Ecotone Landscape Planning, LLC was selected to create the original San Pedro Open Space management plan via a competitive RFP process in 2015 (then doing business as "Ecotone"). No other solicitation would be competitive because Ecotone Landscape Planning has already completed the research, data collection, stakeholder engagement and document preparation for the original management plan, which includes half of the area of the now expanded open space property.

DETERMINATION

Although there are other landscape planning firms that can provide and develop an open space management plan, Ecotone had produced the original management plan and it would not be advantageous to Santa Fe County to contract with any other planning firm to update the management plan that was originally developed by Ecotone.

Due to the specific and technical intent of the original project scope, strategic plan, procurement and Agreement for Planning Services, the County has determined that the procurement of the required services meets the intent of a sole source procurement, pursuant to 13-1-126, NMSA 1978.

Based on this determination it is in the best interest of Santa Fe County to continue the services as a new procurement, as a new solicitation or RFP for these services will give rise to the risk of quality and liability issues in meeting the intent of the original Procurement and contract. Ecotone Landscape Planning, LLC's involvement in the overall intent of the Project will allow the County to fulfill the original intent of the contract with Ecotone.

Contract Information:

Vendor: Ecotone Landscape Planning, LLC
1413 Second Street, Suite 5
Santa Fe, New Mexico 87505-3435

Planning Services will include:

Project Initiation and Research Phase:

1. Review the 2016 San Pedro Open Space Management Plan and identify the elements that are outdated, need to be updated, and those that are still valid
2. Create updated maps that include the two new parcels
3. Gather, read and analyze plans and reports that are relevant to the update of the San Pedro Open Space Management Plan and identify issues that are relevant to the management of San Pedro Open Space.
4. Identify key stakeholders and community members who will provide input and guidance on the update of the management plan
5. Conduct an onsite kick off meeting with Santa Fe County staff, key stakeholders and community members
6. Conduct a detailed site analysis on the expanded property to identify property characteristics such as soil type, vegetation, terrain and other existing conditions

Development of Plan:

1. Hold two stakeholder meetings in the planning phase (one with community members and one with regional trail users) to provide feedback and input on the management of the property, and identify the type and location of desired recreational amenities, including but not limited to: trail alignments, trailhead(s), parking, signage, interpretive exhibits, potential alternatives and future trail connections
2. Draft the management plan update including an updated and expanded conceptual trails plan

3. Hold at least one stakeholder meeting to provide feedback on the draft management plan

Plan Implementation:

1. Flag location of Year-1 restoration projects identified in the updated management plan

2. Flag trail alignments and location of other recreational amenities

**PROFESSIONAL SERVICE AGREEMENT
BETWEEN SANTA FE COUNTY AND ECOTONE
FOR THE CREATION OF SITE SPECIFIC STRATEGIC
MANAGEMENT PLANS FOR OPEN SPACE**

THIS AGREEMENT is made and entered into this 28th day of May 2015, by and between **SANTA FE COUNTY**, hereinafter referred to as the "County" and **Ecotone**, whose principal place of business is located at 1413 Second Street, Suite 5, Santa Fe, New Mexico 87505, hereinafter referred to as the "Contractor".

WHEREAS, the County Open Space and Trails Program requires professional services to create site specific strategic management plans for three priority open space properties in accordance with the Sustainable Growth Management Plan; and

WHEREAS, pursuant to NMSA 1978, Sections 13-1-112 and 13-1-117, competitive, sealed proposals were solicited via a Request for Proposals (RFP) No. 2015-0183-GM/MM for the creation of site specific strategic management plans for three open space properties; and

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

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, it is agreed between the parties:

1. SCOPE OF WORK

The Contractor shall provide for Los Portreros Open Space, San Pedro Open Space and Santa Fe River Open Space at La Cieneguilla, the following:

- A. A strong vision with clear objectives and strategies for resource conservation, agricultural preservation, passive recreation and public access.
- B. An overview of existing conditions and a site specific inventory report.
- C. A master plan that identifies, maps, prioritizes and estimates timing and costs for key projects.
- D. An analysis of potential funding mechanisms needed to fully implement the plan.
- E. A detailed maintenance plan which includes projected needs for labor and equipment.
- F. Coordination with County staff to review and compile background information and develop a final scope, approach and schedule including a communication plan and calendar.
- G. A Strategic Management Plan that includes community outreach, a conceptual master plan, funding analysis, and maintenance plan for each property.

Deliverables:

Phase I Scoping.

- A. A set of base maps for each open space property.
- B. A catalog/virtual library with a compilation of existing plans, technical reports, policies, and regulations.
- C. Two (2) site tours of each site, six (6) in total.
- D. A flow chart and narrative of proposed final scope of work, approach and schedule for each site.
- E. Meet with County staff to present findings, discuss work plan presentation, provide feedback, update scope of work, and finalize work plans.

Phase II. Inventory & Assessment

- A. An overview assessment inventory (overview report).

Phase III. Strategic Management Plan

- A. Community outreach meetings at each open space property to include six (6) focus groups and/or three (3) visioning sessions. One (1) or two (2) at each site led by the Community Store. Three (3) charrettes, one (1) at each open space property, led by Ecotone, River Source, and Surroundings.
- B. Master Plan development for each open space property including details on prioritization, scope and size of key projects: priorities, locations (maps), timing, costs, partnerships, and how to implement.
- C. A report on potential funding mechanisms for full plan implementation.
- D. A detailed maintenance plan which includes projected needs for labor and equipment.
- E. Collaboration with County staff to develop a communication plan and calendar for master plan implementation.
- F. Implementation plan for each open space property three (3) in total.

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) For services provided in conformity with this Agreement, Contractor shall invoice the County monthly. Invoices shall include a monthly detailed status report for all activities performed in relation to project tasks and

phases as outlined in Exhibit A and Exhibit B.

- 2) The total amount payable to the Contractor under this Agreement shall not exceed one hundred fifty thousand dollars (\$150,000.00) inclusive of New Mexico gross receipts tax. Any New Mexico gross receipts tax levied on the amounts payable under this Agreement shall be paid by the County to the Contractor.
- 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 contractual items or services for which payment is sought. 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 items or services. Within thirty (30) days of the issuance of a written certification accepting the contractual items or services, the County shall tender payment for the accepted items or services. In the event the County fails to tender payment within thirty (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 one (1) year later, unless earlier terminated pursuant to Section 5 (Termination) or Section 6 (Appropriations and Authorizations). The County has the option to extend the contract at the same price, terms and conditions for three (3) additional years in one (1) year increments. In no event, shall this Agreement exceed four (4) years. The County may exercise this option by submitting a written notice to Contractor that the Agreement will be extended an additional year. The notice must be submitted to Contractor at least sixty (60) days prior to expiration of the term of the Agreement.

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 thirty (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 thirty (30) days, the breaching party shall have a reasonable time to cure the breach, provided that, within thirty (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 fifteen (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 after the termination date. 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 federal and 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 (6) 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 (6) 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
Office of the County Attorney
102 Grant Avenue
Santa Fe, New Mexico 87501

To the Contractor: Ecotone
Attention: Jan-Willem Jansens
1413 Second Street, Suite 5
Santa Fe, New Mexico 87505

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. The Contractor shall also procure and maintain during the life of this Agreement an automobile insurance policy liability limits in amounts not less than \$100,000.00 combined single limits of liability for bodily injury, including death, and property damage for any one occurrence. Said policies of insurance combined 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 named additional insured on the comprehensive general liability insurance 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

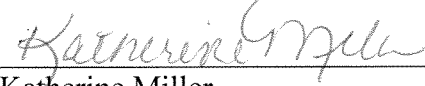
The Contractor agrees to compute and submit simultaneous with execution of this Agreement a Campaign Contribution Disclosure Form approved by the County.

31. 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
Santa Fe County Manager

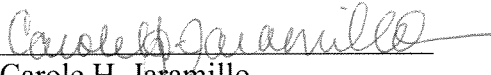
5-28-15
Date

Approved as to form


Gregory S. Shaffer
County Attorney

5/26/15
Date

Finance Department


Carole H. Jaramillo
Santa Fe County Finance Director

5/27/15
Date

CONTRACTOR


Jan-Willem Jansens
Owner/Principal

5/27/2015
Date

Exhibit A

SCOPE OF WORK SANTA FE COUNTY MANAGEMENT PLAN

Task #	Ecotone SOW	Ecotone Deliverables	SFCO SOW	SFCO Deliverable
1.1	Prepare initial (limited) base maps for each site using the County GIS System	A set of base maps needed for field reconnaissance and stakeholder meetings for each of the 3 sites		A. A set of base maps.
1.2	Analyze GIS information for errors and data gaps (limited to map data needed for planning)	Summary report on quality, general accuracy, resolution and compatibility of GIS data; incl description of data gaps and errors and recommendations on how to resolve them		
1.3	Project team start-up meeting with Co project mgr; and conduct sites recon visits for each site	Team start up meeting; meeting with project manager; prep and implem of 3 site recon visits (one per site); data review and documentation; feedback to County project manager		C(1). Two (2) site tours of each site, six (6) in total;
1.4	Review and compilation of existing plans, technical reports, policies, and regulations for each site	A catalog/virtual library with a compilation of existing plans, technical reports, policies, and regulations		B. A catalog/virtual library with a compilation of existing plans, technical reports, policies, and regulations;
1.5	(Cursory) review of document to extract goals and policies relevant to each site and each site's planning context	Deser of goals, policies, and management concerns and opp for each OS site; and other info relevant for management and master planning components; a partial logic model (etc.)		
1.6	Identify initial project stakeholder group for each site with County Project Manager (in office only)	Creation of stakeholder contact list for each site; a list of planning needs/program of objectives; a list of follow-up issues to research		
1.7	Prepare existing information assessments and preliminary site analysis for each site using GIS info and observations from site recon visits (not in the field)	Creation of basic site analysis maps and graphics for meetings with community groups and for our own field tours		

Task #	Ecotone SOW	Ecotone Deliverables	SFCO SOW	SFCO Deliverable
1.8	Plan and conduct separate tours of each site (3 visits) with the relevant stakeholders	Site tours of each site: follow up terrain assessments and meeting with key stakeholders		C(2). Two (2) site tours of each site, six (6) in total;
1.9	Conduct one visioning meeting with key stakeholder groups at each site (total 3 meetings)	One visioning meeting with key stakeholder groups at each site (total 3) to obtain broad community involvement etc.		
1.10	Establish final scope of work, approach, and schedule for each site	Flow chart and narrative of proposed final scope of work, approach and schedule, including communication plan and calendar, in order to finalize the scoping process	F. Coordination with County staff to review and compile background information and develop a final scope, approach and schedule including a communication plan and calendar.	D. A Flow chart and narrative of proposed final scope of work, approach and schedule for each site;
1.11	Formulate plan methodology and recommendations for County OS Management Planning Process Model	Planning methodology and planning process recomm. for SFCO toward OS Management Plan Template		
1.12	Meeting with County officials and staff to present findings	Meeting with County officials and staff and key stakeholders (if desired) to negotiate phases 2 and 3, incl communication plan and calendar; etc.		E. Meet with County staff to present findings, discuss work plan presentation, provide feedback, update scope of work, and finalize work plan.
2.1	Field characterizations for each site, as specified in Phase-1	An existing condition and inventory (overview) report	B. An overview of assessments on existing conditions and a site specific inventory report.	A. An existing conditions inventory (overview report).

Task #	Ecotone SOW	Ecotone Deliverables	SFCO SOW	SFCO Deliverable
3.1	Community outreach for the Strategic Management Plan for each property	Community outreach meetings at each property: 6 focus groups and/or 3 visioning sessions (one or two at each site led by the Community Store), 3 charrettes (one on each site, led by Ecotone, River Source, and Surroundings.		A. Community outreach meetings at each property to include six (6) focus groups and/or three (3) visioning sessions. One (1) or two (2) at each site led by the Community store. Three (3) charrettes, one (1) at each site, led by Ecotone, River Source, and Surroundings.
3.2	Master Plan for each property that identifies maps, priorities, and estimates of timing and costs for key projects	Master Plan development for each site, including details on prioritization, scope and size of key projects: priorities, locations (maps), timing, costs, partner-ships, and how to implement	C. A master plan that identifies, maps, prioritizes and estimates timing and costs for key projects.	B. Master plan development for each site including details on prioritization, scope and size of key projects: priorities, locations (maps), timing, costs, partnerships, and how to implement
3.3	Analysis of potential funding mechanisms to fully implement the plan	General and per site: Report on potential funding mechanisms for full plan implementation	D. An analysis of potential funding mechanisms needed to fully implement the plan.	C. A report on potential funding mechanisms for full plan implementation;
3.4	Detailed maintenance plans for each property with projected needs for labor and equipment	General and per site: A detailed maintenance plan which includes projected needs for labor and equipment	E. A detailed maintenance plan which includes projected needs for labor and equipment.	D. A detailed maintenance plan which includes projected needs for labor and equipment;
3.5	In collaboration with County staff, review and compile an Implementation Plan for site management and maintenance	Working with County Staff, development of a communication plan and calendar for master plan implementation (to be integrated in task 3.6, based on negotiation at end of phase 1)		E. Collaboration with County staff to develop a communication plan and calendar for master plan implementation

Task #	Ecotone SOW	Ecotone Deliverables	SFCO SOW	SFCO Deliverable
3.6	Site-specific Final Strategic Management Plan: strong vision, clear objectives, strategies for resource conservation, passive recreation, public access	Final Strategic Management Plans for each site; recommendations for plan evaluation, etc.	A. A strong vision with clear objectives and strategies for resource conservation, agricultural preservation, passive recreation and public access. G. A Strategic Management Plan that includes community outreach, a conceptual master plan, funding analysis, and maintenance plan for each property.	F. Management plans for each site three (3) in total.

Exhibit B

Cost Estimate Whole Project 150K 041615

COST ESTIMATE PROPOSAL FOR CREATION OF MANAGEMENT PLANS FOR THREE OPEN SPACE PROPERTIES - PHASES 1-3

4/16/2015

Deliverables identified in the SF County RFP are printed in bold and italics

PHASE/COMPONENT	TASKS	ACTOR	PERSONNEL	FEES	HOURS	COSTS	OUTPUT/DELIVERABLES
1. Scoping							
1.1	Prepare initial base maps for each site using the County GIS System (A)	Ecotone River Source Surroundings Community Store Earth Analytic	Principal/Lead Director Associate Principal Proj. Manager Designer Facilitators Geospatial Arch. Senior GIS Spec.	100 77 55 140 110 95 150 140 100	5 2 1 2 1 3 0 2 12	\$ 500.00 \$ 154.00 \$ 55.00 \$ 280.00 \$ 110.00 \$ 285.00 - \$ 280.00 \$ 1,200.00	A set of base maps needed for field reconnaissance and stakeholder meetings for each of the 3 sites
TOTAL 1.1				\$ 2,864.00			
1.2	Analyze GIS information for errors and data gaps (A)	Ecotone River Source Surroundings Community Store Earth Analytic	Principal/Lead Director Associate Principal Proj. Manager Facilitators Geospatial Arch. Senior GIS Spec.	100 77 55 140 110 150 140 100	4 2 0 1 1 0 3 6	\$ 400.00 \$ 154.00 - \$ 140.00 \$ 110.00 - \$ 420.00 \$ 600.00	Summary report on quality, general accuracy, resolution and compatibility of GIS data; including a description of data gaps and errors and recommendations on how to resolve them
TOTAL 1.2				\$ 1,824.00			
1.3	Project team start-up meeting with County project manager; and conduct site reconnaissance visits for each site (B)	Ecotone River Source Surroundings Community Store Earth Analytic	Principal/Lead Director Associate Principal Proj. Manager Facilitators Geospatial Arch. Senior GIS Spec.	100 77 55 140 110 150 140 100	46 26 14 16 24 1 1 1	\$ 4,600.00 \$ 2,002.00 \$ 770.00 \$ 2,240.00 \$ 2,640.00 \$ 150.00 \$ 140.00 \$ 100.00	Team start up meeting; meeting with project manager; preparation and implementation of 3 site reconnaissance visits (one per site); data review and documentation; feedback to County project manager
TOTAL 1.3				\$ 12,642.00			
1.4	<i>Review and compilation of existing plans, technical reports, policies, and regulations for each site (D)</i>	Ecotone River Source Surroundings Community Store Earth Analytic	Principal/Lead Director Associate Principal Proj. Manager Designer Facilitators Geospatial Arch. Senior GIS Spec.	100 77 55 140 110 95 150 140 100	8 8 2 2 2 0 2 4	\$ 800.00 \$ 616.00 - \$ 280.00 \$ 220.00 \$ 190.00 - \$ 280.00 \$ 400.00	A catalog/virtual library with a <i>compilation of existing plans, technical reports, policies, and regulations</i>

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1.9	Conduct one visioning meeting with key stakeholder groups at each site (3 meetings) (C)	Ecotone River Source Surroundings Community Store Earth Analytic	Principal/Lead Director Associate Principal Proj. Manager Facilitators Geospatial Arch. Senior GIS Spec.	100 77 55 140 110 150 140 100	24 2 2 3 3 24 0 0	\$ \$ \$ \$ \$ \$ \$ \$	2,400.00 154.00 110.00 420.00 330.00 3,600.00 - -	One visioning meeting with key stakeholder groups at each site (total 3 meetings) to obtain broad community involvement in the strategic plan development for each site and assess local stewardship capacity; refine community-wide input process for phases 2 and 3
TOTAL 1.9							\$ 7,014.00	
1.10	Establish final scope of work, approach, and schedule for each site (G)	Ecotone River Source Surroundings Community Store Earth Analytic	Principal/Lead Director Associate Principal Proj. Manager Facilitators Geospatial Arch. Senior GIS Spec.	100 77 55 140 110 150 140 100	11 1 2 6 6 2 1.5 1	\$ \$ \$ \$ \$ \$ \$ \$	1,100.00 77.00 110.00 840.00 660.00 300.00 210.00 100.00	Flow chart and narrative of proposed final scope of work, approach and schedule, including communication plan and calendar, in order to finalize the scoping process between Ecotone and SF County and negotiate scope and fee adjustments for phases 2 and 3
TOTAL 1.10							\$ 3,397.00	
1.11	Formulate plan methodology and recommendations for County Open Space Management Planning Process Model (G)	Ecotone River Source Surroundings Community Store Earth Analytic	Principal/Lead Director Associate Principal Proj. Manager Designer Facilitators Geospatial Arch. Senior GIS Spec.	100 77 55 140 110 95 150 140 100	8 3 0 4 2 0 3 2 0	\$ \$ \$ \$ \$ \$ \$ \$ \$	800.00 231.00 - 560.00 220.00 - 450.00 280.00 -	Planning methodology and planning process recommendations for Santa Fe County toward an Open Space Management Plan Template
TOTAL 1.11							\$ 2,541.00	
1.12	Meeting with County officials and staff to present findings (H)	Ecotone River Source Surroundings Community Store Earth Analytic	Principal/Lead Director Associate Principal Proj. Manager Facilitators Geospatial Arch. Senior GIS Spec.	100 77 55 140 110 150 140 100	10 0 4 2 0 2 2 8	\$ \$ \$ \$ \$ \$ \$ \$	1,000.00 - 220.00 280.00 - 300.00 280.00 800.00	Meeting with County officials and staff and key stakeholders (if desired) to negotiate phases 2 and 3, including communication plan and calendar : - Work Plan presentation and feedback; update of SOW, work plan and fee allocation
TOTAL 1.12							\$ 2,880.00	
TOTAL							\$ 55,900.00	
DIRECT COSTS: travel and printing							\$ 2,000.00	
NM GRT							\$ 4,740.56	
GRAND TOTAL Phase 1							\$ 62,640.56	

PHASE/COMPONENT	TASKS	ACTOR	FEES	HOURS	COSTS	OUTPUT/DELIVERABLES
2. Inventory & Assessment	2.1. Field characterizations for each site, as specified in Phase-1 (instead of detailed existing conditions and site specific inventory) (A)	Ecotone	100	20	\$ 2,000.00	An existing conditions and inventory (overview) report: a triage of existing conditions, a list of key assessment projects to be addressed later, and a preliminary prioritization and identification of potentially conflicting choices
		Miscell. Consultants:	100	195	\$ 19,500.00	
		TBD				
	TOTAL 2.1				\$ 21,500.00	
	TOTAL				\$ 21,500.00	
3. Strategic Management Plans	DIRECT COSTS: travel and printing				\$ 500.00	Community outreach meetings at each property: 6 focus groups and/or 3 visioning sessions (one or two at each site led by the Community Store), 3 charrettes (one at each site, led by Ecotone, River Source, and Surroundings)
	NM GRT		0.081875		\$ 1,801.25	
	GRAND TOTAL Phase 2				\$ 23,801.25	
	TOTAL 3.1				\$ 20,734.00	
	TOTAL 3.2				\$ 16,498.00	
PHASE/COMPONENT	TASKS	ACTOR	FEES	HOURS	COSTS	OUTPUT/DELIVERABLES
3.1. Community outreach for the Strategic Management Plan for each property (A, B)	Ecotone	Principal/Lead	100	61	\$ 6,100.00	Community outreach meetings at each property: 6 focus groups and/or 3 visioning sessions (one or two at each site led by the Community Store), 3 charrettes (one at each site, led by Ecotone, River Source, and Surroundings)
	River Source	Director	77	27	\$ 2,079.00	
	Surroundings	Associate	55	9	\$ 495.00	
		Principal	140	27	\$ 3,780.00	
		Proj. Manager	110	9	\$ 990.00	
3.2. Master Plan for each property; that identifies maps, priorities, and estimates of timing and costs for key projects (A, B)	Community Store	Designer	95	6	\$ 570.00	Master Plan development for each site, including details on prioritization, scope and size of key projects: priorities, locations (maps), timing, costs, partnerships, and how to implement
	Earth Analytic	Facilitators	150	38	\$ 5,700.00	
		Geospatial Arch.	140	3	\$ 420.00	
		Senior GIS Spec.	100	6	\$ 600.00	
	TOTAL 3.1				\$ 20,734.00	
3.2. Master Plan for each property; that identifies maps, priorities, and estimates of timing and costs for key projects (A, B)	Ecotone	Principal/Lead	100	58	\$ 5,800.00	Master Plan development for each site, including details on prioritization, scope and size of key projects: priorities, locations (maps), timing, costs, partnerships, and how to implement
	River Source	Director	77	24	\$ 1,848.00	
	Surroundings	Associate	55	12	\$ 660.00	
		Principal	140	24	\$ 3,360.00	
		Proj. Manager	110	12	\$ 1,320.00	
3.2. Master Plan for each property; that identifies maps, priorities, and estimates of timing and costs for key projects (A, B)	Community Store	Designer	95	6	\$ 570.00	Master Plan development for each site, including details on prioritization, scope and size of key projects: priorities, locations (maps), timing, costs, partnerships, and how to implement
	Earth Analytic	Facilitators	150	6	\$ 900.00	
		Geospatial Arch.	140	6	\$ 840.00	
		Senior GIS Spec.	100	12	\$ 1,200.00	
	TOTAL 3.2				\$ 16,498.00	

3.3.	Analysis of potential funding mechanisms to fully implement the plan (C)	Ecotone	Principal/Lead	100	12	\$	1,200.00	<i>General and per site: Report on potential funding mechanisms for full plan implementation</i>
		River Source	Director	77	6	\$	462.00	
		Surroundings	Associate	55	0	\$	-	
			Principal	140	12	\$	1,680.00	
		Community Store	Proj. Manager	110	6	\$	660.00	
		Earth Analytic	Designer	95	0	\$	-	
			Facilitators	150	0	\$	-	
			Geospatial Arch.	140	0	\$	-	
			Senior GIS Spec.	100	0	\$	-	
		TOTAL 3.3				\$	4,002.00	
3.4.	Detailed maintenance plans for each property with projected needs for labor and equipment (D)	Ecotone	Principal/Lead	100	22	\$	2,200.00	<i>General and per site: A detailed maintenance plan which includes projected needs for labor and equipment</i>
		River Source	Director	77	6	\$	462.00	
		Surroundings	Associate	55	3	\$	165.00	
			Principal	140	6	\$	840.00	
		Community Store	Proj. Manager	110	6	\$	660.00	
		Earth Analytic	Designer	95	0	\$	-	
			Facilitators	150	0	\$	-	
			Geospatial Arch.	140	0	\$	-	
			Senior GIS Spec.	100	0	\$	-	
		TOTAL 3.4				\$	4,327.00	
3.5	In collaboration with County staff, review and compile an Implementation Plan for site management and maintenance (E) - (to be integrated in task 3.6, based on negotiation at end of phase 1)							<i>Working with County staff, development of a communication plan and calendar for master plan implementation - (to be integrated in task 3.6, based on negotiation at end of phase 1)</i>
	TOTAL 3.5					TBD		
3.6	Site-specific Final Strategic Management Plan: strong vision, clear objectives, strategies for resource conservation, ag preservation, passive recreation, public access (F)	Ecotone	Principal/Lead	100	42	\$	4,200.00	<i>Final Strategic Management Plans for each site; recommendations for plan evaluation, adaptive management, and plan update cycles; including final review and feedback meetings with County officials, staff, and stakeholders</i>
		River Source	Director	77	3	\$	231.00	
		Surroundings	Associate	55	0	\$	-	
			Principal	140	12	\$	1,680.00	
		Community Store	Proj. Manager	110	3	\$	330.00	
		Earth Analytic	Designer	95	0	\$	-	
			Facilitators	150	24	\$	3,600.00	
			Geospatial Arch.	140	2	\$	280.00	
			Senior GIS Spec.	100	12	\$	1,200.00	
		TOTAL 3.6				\$	11,521.00	
		DIRECT COSTS: travel and printing				\$	57,082.00	
		NM GRT				\$	1,650.00	
				0.081875		\$	4,808.68	
		GRAND TOTAL Phase 3				\$	63,540.68	
		Allowance for GRT Increase				\$	17.50	
		Grand Total Phases 1, 2, and 3				\$	150,000.00	