



Procurement Department

**REQUEST FOR QUOTATIONS
For**

**Consulting Services for Transition Management and
Organizational Planning**

For

**HOUSING AUTHORITY OF THE
CITY OF SAN ANTONIO, TEXAS
AND
AFFILIATED ENTITIES**

IFB #: 0906-918-75-2957

Prepared by:

Department of Procurement
of the
The San Antonio Housing Authority
818 South Flores Street
San Antonio, Texas 78204

President and CEO..... Lourdes Castro Ramirez

June 2009

Request for Quotes 0906-918-75-2957

OBJECTIVE:

The San Antonio Housing Authority (SAHA) requests quotes from individuals or firms with experience to provide assistance in SAHA's transition management and organizational planning.

QUOTATION DUE DATE:

The responses are due no later than 5:00 PM on Friday, June 5, 2009.

Responses will be accepted:

By e-mail to charles_bode@saha.org

By fax to: 210-477-6167 Attn: Charles Bode, Assistant Director of Procurement

Hand delivered to:

Charles Bode
Assistant Director of Procurement
818 S. Flores
San Antonio, TX 78204

SCOPE OF WORK:

- 1 Assist the CEO to develop a strong baseline view on the financial, operational and organizational health of SAHA. This baseline will allow management to identify the priority issues and areas of focus and to measure the agency's progress over time.
- 2 Working with the CEO, identify key priorities to be accomplished by the organization within the next twelve (12) months.
- 3 Assist the CEO to develop a key financial and operational metrics baseline package based on data and information, including organizational charts and agency and departmental plans.
- 4 Obtain input from the Board of Commissioners and other key stakeholders including executive staff.
- 5 Conduct interviews and surveys with identified SAHA staff to assess the organization and establish the baseline.
- 6 Assist the CEO to develop metrics and performance measures for the agency.

DELIVERABLES:

- 1 Prepare a presentation for the Board with the initial results and obtain Board feedback.
- 2 Produce a document that lists key short and long term priorities for the agency with a strategic internal action plan focused on the initial twelve (12) months (July 1, 2009 – June 30, 2010).
- 3 An evaluation of the organization's change readiness from a talent, resource and cultural standpoint.
- 4 Produce high-level recommendation on organizational roles and structure changes for the entire agency.
- 5 Provide on-going planning and executive level advisory service as needed.

TIMEFRAME FOR PROJECT:

- 1 Start date for the project shall be no later than June 15, 2009.
- 2 Complete the baseline review within thirty (30) days of start date for the project.
- 3 Complete the twelve (12) month strategic internal plan within ninety (90) days of start date or sooner.
- 4 Provide on-going planning and executive level advisory service for a period not to exceed one-year.

AWARD CRITERIA:

If an award is completed pursuant to this Solicitation, and unless otherwise instructed by SAHA, award shall be made based on the "best value" to SAHA. The "best value" is based on cost, the bidders experience in public housing, financial and organizational planning and if the bidder can complete the project in the allotted timeframe. As a result, Bidder shall provide information indicating level of experience and means to complete the desired project by the timeframe indicated.

PROPOSED FEE:

Item 1: Fee to deliver items and perform the services requested in this quote. This shall be a firm fixed price including all expenses. Please note that the proposed fee submitted by each bidder are inclusive of all necessary costs to provide the proposed services, including, but not limited to: employee costs and benefits; clerical support; overhead; profit; supplies; materials; licensing; insurance; travel; lodging and per diem, etc. Please note that this firm-fixed price is inclusive of all elements required to deliver the service and the cost proposed shall be fully "burdened" with profit and overhead costs. SAHA will not be responsible for paying any additional expenses or fees in the completion of this project.

\$ _____

In submitting this bid, it is understood if written notice of the acceptance of this bid is mailed, telegraphed, or delivered to the undersigned within sixty days after the opening thereof, or at any time thereafter before this bid is withdrawn, the undersigned agrees to execute and deliver the products described herein. By signature hereon the bidder certifies he has the right and authority to bind the company.

Submitted by: _____ Date: _____
(Firm)

(Signature) (Printed name and title)

(Business address,)

(Phone) (E-mail)

GENERAL TERMS & CONDITIONS

- 1.0 SAN ANTONIO HOUSING AUTHORITY (SAHA) CONTACT:** All questions pertaining to this quotation shall be addressed to Charles Bode, Asst. Director of Procurement, telephone 210-477-6703, fax 210-477-6167 or e-mail at charles_bode@saha.org.
- 2.0 APPLICABILITY:** By submitting a quote (hereinafter referred to as "bid") to SAHA, the firm or individual doing so (hereinafter, "the bidder") is automatically agreeing to abide by all terms and conditions listed herein, including those terms and conditions within the HUD document, *Table 5.1, Mandatory Contract Clauses for Small Purchases Other Than Construction*, which is included by reference and SAHA's General Terms & Conditions contained herein. Copies of Table 5.1 may be obtained by contacting Charles Bode, Asst. Director of Procurement, telephone 210-477-6703, fax 210-477-6167 or e-mail at charles_bode@saha.org.
- 3.0 SAHA's RESERVATION OF RIGHTS:** SAHA reserves the right to:
 - 3.1** Reject any or all bids, to waive any informalities in the Solicitation process, or to terminate the Solicitation process at any time, if deemed by SAHA to be in the best interest of SAHA;
 - 3.2** Terminate a contract awarded pursuant to this Solicitation at any time for its convenience upon delivery of a 14-day written notice to the apparent or successful bidder;
 - 3.3** Determine the days, hours and locations that the successful bidder shall provide the items or services called for in this Solicitation;
 - 3.4** Reject and not consider any bid that does not, in the opinion of SAHA, meet the requirements of this Solicitation, including but not necessarily limited to incomplete bids and/or bids offering alternate (not including "or equal" items) or non-requested items or services;
 - 3.5** SAHA reserves the right to:
 - 3.5.1** To make award to the same bidder (aggregate) for all items; or,
 - 3.5.2** To make award to multiple bidders for the same or different items.
- 4.0 BIDDER'S RESPONSIBILITY:** Each bidder must carefully review and comply with all instructions provided herein, or provided within any named attachments.
- 5.0 DEADLINE:** Each bidder shall submit his/her proposed costs, experience and qualifications prior to the posted deadline, where provided herein. Whereas this is an informal solicitation process, SAHA reserves the right to extend the posted deadline at any time prior to the deadline, if, in the opinion of SAHA, it is in the best interests of SAHA.
- 6.0 HOLD PRICES/NON-ESCALATION:** By submitting a bid, each bidder thereby agrees to "hold" or not increase the proposed bid prices for a minimum period of sixty (60) days with no escalation. Quantities listed in this Solicitation are for the purpose of determining best pricing per line item.
- 7.0 PURCHASE ORDER (PO):** SAHA will procure the applicable goods or services by issuance of a PO. By submitting a bid, the successful bidder thereby agrees to confirm receipt of the PO in the manner directed by SAHA.

- 8.0 BID COST S:** There shall be no obligation for SAHA to compensate any bidder or prospective bidder for any costs that he/she may incur in responding to this Solicitation.
- 9.0 ASSIGNMENT OF PERSONNEL:** SAHA shall retain the right to demand and receive a change in personnel assigned by the successful bidder to provide services to SAHA if SAHA believes that such change is in the best interest of SAHA and the completion of the work or provision of the items.
- 10.0 UNAUTHORIZED SUB-CONTRACTING PROHIBITED:** The successful bidder shall not assign any right, nor delegate any duty for the work proposed pursuant to this Solicitation (including, but not limited to, selling or transferring the existing PO or contract) without the prior written consent of SAHA. Any purported assignment of interest or delegation of duty, without the prior written consent of SAHA shall be void and may result in the cancellation of the PO or contract with SAHA.
- 11.0 LICENSING AND INSURANCE REQUIREMENTS:** By submitting a bid the successful bidder thereby certifies that he/she possess and will, prior to issuance of a PO by SAHA, present to SAHA, proof and/certification of the following:
- 11.1** If applicable, local business license or permit issued by the City of San Antonio,
- 11.2** If applicable, a copy of the bidder's license issued by the State of Texas licensing authority allowing the bidder to provide the services or products as detailed herein,
- 11.3** General liability insurance coverage (naming SAHA as an additional insured, and certificate holder along with the applicable endorsement), automobile insurance coverage (naming SAHA as an additional insured, and certificate holder along with the applicable endorsement), in amounts designated by SAHA,
- 11.4** Appropriate worker's compensation insurance coverage.
- 12.0 INSURANCE:** The following table details the standard liability policies with the required limits and waivers of subrogation required by SAHA of all contractors performing work on SAHA property.

Professional Liability	Required Limits
SAHA and its affiliates must be named as an Additional Insured and be a Certificate Holder. This is required for vendors who render observational services to SAHA such as appraisers, inspectors, attorneys, engineers or consultants.	\$300,000
Business Automobile Liability	Required Limits
SAHA and its affiliates must be named as an additional insured and as the certificate holder. This is required for any vendor that will be using their vehicle to do work on SAHA properties.	\$500,000 combined single limit, per occurrence
Workers Compensation and Employer's Liability	Required Limits
Workers' Compensation coverage is Statutory and has no pre-set limits. Employer's Liability limit is \$500,000. Workers' Compensation is required for any vendor made up of more than one person. A Waiver of Subrogation in favor of SAHA must be included in the Workers' Compensation policy. SAHA and its affiliates must be a Certificate Holder.	Statutory \$500,000
Commercial General Liability	Required Limits
This is required for any vendor who will be doing hands on work at SAHA properties. SAHA and its affiliates must be named as an Additional Insured and as the Certificate Holder.	\$1,000,000 per accident \$2,000,000 aggregate