



**City of San Antonio
Department of Community Initiatives**

REQUEST FOR QUALIFICATIONS (RFQ)

RFQ DCI FY07 and FY08

APPLICATION PACKET GUIDELINES

for

Various Artistic and Consulting Services

The Request for Qualifications will be available Monday, October 1, 2007 and may be obtained from:

Department of Community Initiatives
Contracts Section
115 Plaza de Armas, Rm. 200
San Antonio, TX 78205

<http://www.sanantonio.gov/rfp>

Qualifications will be accepted beginning Monday, October 1, 2007 and will continue to be accepted until September 30, 2008.

TABLE OF CONTENTS

Section	Page Number
Background	3
Scope of Services	3-5
Term of Contract	6
Application Requirements	6-7
Submission of Application	7-9
Evaluation Criteria	9-10
Award of Contract and Reservation of Rights	10-11
Schedule of Events	11
Application Checklist	Attachment A
Respondent Qualification General Questionnaire	Attachment B
Vendor IRS Form	Attachment C
Matrix of Services Offered	Attachment D
Litigation Disclosure	Attachment E
Discretionary Contracts Disclosure	Attachment F
Model Contract	Attachment G

NOTICE: THIS IS AN EXTENSION OF THE TERM OF THIS RFQ. THE RFQ DCI FY06 and FY07 FOR VARIOUS ARTISTIC AND CONSULTING SERVICES SET TO EXPIRE ON SEPTEMBER 30, 2007 WILL BE EXTENDED THROUGH SEPTEMBER 30, 2008 WITH ALL EXISTING APPLICATIONS REMAINING VALID THROUGH THE EXTENDED TERM UNLESS A RESPONDENT NOTIFIES THE CITY THAT IT DOES NOT WISH TO REMAIN ON THE VENDOR LIST. ALL NEW RESPONDENTS SHALL BEGIN USING THIS REVISED APPLICATION FORM IMMEDIATELY.

Do not submit this 11 page document “APPLICATION PACKET GUIDELINES” with your application. Only submit those forms and documents listed on the Application Checklist (Attachment A).

I. BACKGROUND

The City of San Antonio's Department of Community Initiatives (DCI) is requesting applications from qualified firms, artists, consultants, academic institutions, non-profit organizations, public policy research institutions, etc. to provide professional and personal consulting services as described in this package. DCI will use responses from qualified respondents to compile a vendor list which will be maintained for use by the City to enter into Professional Services Contracts on an "as needed" or "as requested" basis. Contracts through this RFQ could begin anytime after issue of this RFQ and upon receipt of acceptable Qualifications from a respondent. There is no deadline to submit your Qualifications, however, as needs are identified, Contracts will be awarded. Therefore a Respondent, who submits early in the process, will be afforded a greater opportunity to Contract with the City.

The City will Contract with selected consultants to provide services in the following categories: Artistic Services; Planning, Research and Development; and Staff/Volunteer Training; Volunteer Income Tax Assistance site operations; and Direct Professional Services. A list of services anticipated to be purchased is included in Attachment D- Matrix of Services Offered.

No Contract and its scope of services to be performed as a result of this RFQ will be more than \$50,000.00. If the Applicant is awarded more than one Contract during the same year, the City and Contracted Consultant shall ensure that no Applicant receives more than \$50,000.00 as a total from all Contracts with the same scope of service as a result of this RFQ. Participation in this RFQ does not adversely affect and does not bar the applicant from participating in other City procurements. The \$50,000.00 limit applies specifically to this RFQ and does not apply to other Request for Proposals, Request for Offers, Bids, Best Value Bids, or other competitive procurement methods that may be offered during the term of this RFQ by the City.

For all Consultant Contracts being paid by funds granted by the State of Texas, Office of the Governor, Criminal Justice Division (CJD), prior approval is required by CJD of all Contracts or group of Contracts to a single vendor that are in excess of \$15,000.00

The City will adhere to all other limits and requirements of grantors through use of this RFQ. Subject matter experts in the individual grant funds used will determine the suitability of this procurement method in using the services solicited through this RFQ. The responsible Division designates subject matter experts in grant funds. Division staff selecting a consultant will bear the responsibility for determining appropriateness of services, qualifications, and allowability of the expense when grant funds being used.

A year is defined as the City's Fiscal Year, which begins October 1st and ends September 30th.

II. SCOPE OF SERVICES

Respondents are required to complete Attachment D Matrix of Services Offered. For each type of service offered, Respondent should attach a description of the specific scope, curriculum, or sample.

Artistic Services

The City anticipates that most Contracts with Artists will be for training of youth or other program participants and should offer the youth or participant an opportunity to delve into the aspects of artistic creativity through hands-on instruction. However, artistic services may be contracted for other uses such as advertising, etc. The City typically provides payment for artistic services upon completion of the art item.

Artists should provide with their application the following:

- Resume of the Artist
- Experience in teaching others (include description of population that Artist taught)
- Recent and/or most significant works by the Artist include name, date, place and description of any exhibits
- Sample of art work (prefer digital photographs included on the diskette but will accept other “hard copy” photographs not larger than 8 ½ X 11 inches and brochures).
- References, as applicable

Planning, Research and Development Services

Planners, Researchers and/or Developers should include with their application, the following:

- Resume of the Planner(s), Researcher(s) and/or Developer(s)
- Experience in *Planning, Research and Development Services* (at a minimum, include timelines, the type and date of planning, research or development completed, name of organization for which the work was completed, and a writing and/or data analysis sample).
- Experience in Facilitation (include description of facilitation that includes the population affected and types of data or instruments used)
- Descriptive methodological approaches
- Measurable outcomes and recommendations
- Experience in implementing recommendations or grants
- References

Staff / Volunteer Training

Trainers should include with their application, the following:

- Resume of the Trainer(s)

- Experience in delivering training (include description of population trained—organizational levels {line, supervisory, management, executive}, position classifications; educational levels)
- Description of training philosophy
- Description of curriculum (include timelines)
- Descriptive methodological approaches
- Evaluation instruments
- Measurable outcomes
- Bilingual capability, as needed
- References, as applicable

Volunteer Income Tax Assistance (VITA) site operators shall include with their application:

- An assurance that the VITA site operator will offer free income tax return preparation to qualified working families
- Experience in delivering similar services
- Description of the methodology to be used to recruit qualified working families
- Description of hours of operation (Sites must operate during various hours, including evenings and weekends, from January 20th through April 15th.)
- Description of how the VITA site operator will manage site operations, assign volunteer tax preparers, ensure tax returns are completed accurately and in a timely manner, and report problems or concerns to the City.
- Resume or Job Description of the Site Coordinator and clerical staff. (Each site must be staffed with a site coordinator, at least one clerical person, and sufficient tax preparers to operate a minimum of 27 hours a week depending upon site operating hours and days of operation.)
- Bilingual capability, as needed
- References, as applicable

City support for VITA site operators:

The City will train site coordinators, clerical staff and tax preparers, provide tax preparation software and technical assistance. Printed site identification signs will be provided. Other outreach materials will be created by the City for duplication at the sole cost to the site operator.

Technical skills in tax preparation are not required but would be helpful. Site Coordinators, clerical staff and tax preparers are required to attend and successfully complete IRS tax preparation training.

Direct Professional Services

- These services are as defined by Government Code Chapter 2254- Professional and Consulting Services.

Description of Services and/or Curriculum

For each Type of Service Offered (See Attachment D for official titles), the Applicant shall submit a two page (1,000 word or less) written proposal that specifies:

- Name of Applicant
- Type of Service Offered
- Rationale for the program/project
- Explanation of the theories upon which the training or other approach is based
- Objectives of the program/project
- Content of the program/project
- Methods to be used
- Materials needed (including who is to provide them)
- Total Cost estimate of the program/project
- Ability to tailor work to meet the City's specific needs and requirements
- Explanation of how the results of the program/project will be evaluated

III. TERM OF CONTRACT

The length of Contracts awarded as a result of this RFQ will vary depending on the type, nature, and scope of the service offered and required by the City. Artistic services Contracts are generally for the term that it is expected to complete the art item proposed. Planning, Research and Development Services generally will be three to six months in length, but may vary depending on scope of work to be provided. Staff and volunteer training Contracts will generally last one day to one week. Generally, payment for services shall be made upon completion of work.

IV. APPLICATION REQUIREMENTS

4. Respondent's Application shall include the following items in the following sequence:
 - 4.1. APPLICATION CHECKLIST: Completed application checklist. (Attachment A)
 - 4.2. RESPONDENT QUALIFICATION GENERAL QUESTIONNAIRE: Completed Respondent Qualification General Questionnaire. (Attachment B).
 - 4.3. INTERNAL REVENUE SERVICE (IRS) REQUEST FOR TAXPAYER IDENTIFICATION NUMBER AND CERTIFICATION (Substitute W-9): Completed and signed (preferably in blue ink) the IRS Substitute Form 9 (Attachment C)
 - 4.4. MATRIX OF SERVICES OFFERED: Completed Matrix of Services Offered to include pricing. (Attachment D)
 - 4.5. LITIGATION DISCLOSURE. Completed and signed (preferably in blue ink) Litigation Disclosure Form. (Attachment E) If Respondent is proposing as a team or joint venture, then all parties to that team or joint venture shall complete and return this form with the application.

- 4.6. DISCRETIONARY CONTRACTS DISCLOSURE: Completed and signed (preferably in blue ink) Discretionary Contracts Disclosure Form. (Attachment F) If Respondent is proposing as a team or joint venture, then all parties to that team or joint venture shall complete and return this form with the application.
- 4.7. DESCRIPTION OF SERVICES AND/OR CURRICULUM: (Scope of Services Section of RFQ) The Description of Services and/or Curriculum shall include a statement of the work to be accomplished, how Respondent proposes to accomplish and perform each specific service and unique problems perceived by Respondent and their solutions.
- 4.8. REFERENCES AND QUALIFICATIONS:
- 4.8.1. Background of Respondent and support personnel, including professional qualifications and length of time working in Respondent's capacity. Include résumés of key personnel for services that Respondent proposes to perform.
 - 4.8.2. Relevant experience of Respondent as it relates to the scope of services contemplated by the RFQ.
 - 4.8.3. Specific experience with public entity clients, especially large municipalities. If Respondent has provided services for the City in the past, identify the name of the project and the department for which Respondent provided those services. If Respondent is proposing as a team or joint venture, provide the same information for each member of the team or joint venture.
 - 4.8.4. Other resources, including total number of employees, number and location of offices, number and types of equipment available to support this project.
 - 4.8.5. Respondent shall provide three (3) letters of recommendation, preferably from municipalities, for whom Respondent has provided services.
 - 4.8.6. If Respondent has had experience in working as a member of a joint venture or team, describe that experience, including the type of project for which the joint venture or team was formed.
- 4.9. SAMPLES OF WORK, BROCHURES, and/or TRAINING CURRICULUM: Include samples of work, brochures, training curriculum and other relevant information about Respondent you wish the City to consider in its selection.
- 4.10. MODEL CONTRACT. (Attachment G). This Contract includes the terms and conditions which applicants will be required to meet if awarded a Contract. **Do not submit this with your application.**

Note: Respondent is expected to examine this RFQ carefully, understand the terms and conditions for providing the services listed herein and respond completely. FAILURE TO COMPLETE AND PROVIDE ANY OF THESE DOCUMENTS MAY RESULT IN THE

RESPONDENT'S APPLICATION BEING DEEMED NON-RESPONSIVE AND THEREFORE DISQUALIFIED FROM CONSIDERATION.

V. SUBMISSION OF APPLICATION

- 5.1 Attachments A. through D. (above) shall be submitted in both hard copy and electronic format. If electronic samples are not available, these will be accepted in hard copy only. Electronic samples should be compatible with Microsoft Office products such as: Word, Excel, and Power Point. Digital photos must be capable of running in Windows Internet Explorer. Electronic samples will reach a larger audience of potential users than hard-copy samples will, therefore, Respondents submitting electronic samples may have an advantage.

Requirements B, C, E & F. (above) shall each be signed preferably in blue ink and submitted in hard copy.

- 5.2 Respondent shall submit the completed application as described in Section IV in a sealed package. Respondent shall show the name and address of Respondent and "RFQ DCI FY08" clearly marked on the face of the package.

Mailing Address:

City of San Antonio,
Department of Community Initiatives
Office of the Director
ATTN: Contract Services Section
RFQ FY06
P.O. Box 839966,
San Antonio, Texas 78283-3966

Physical Address:

City of San Antonio
Department of Community Initiatives
ATTN: Contract Services Section
115 Plaza de Armas Ste 200
San Antonio, Texas 78205

Applications sent by facsimile will not be accepted.

- 5.3 **Application due date:** This Request for Qualifications will be available on Monday, October 1, 2007 through September 30, 2008. Applications will be accepted at any time during this period. Applicants are encouraged to submit applications early in the process in order to have the greatest opportunity for contracting with the City. City may begin making awards immediately upon receipt of an application at such time that the City determines there is a need for such service and there is a qualified applicant to provide such service.

- 5.4 **Application Format:** Each application shall be typewritten and submitted on 8 ½" x 11" white paper, clipped, not stapled or bound. Font size shall be no less than 12 point type, providing 10 characters to the linear inch. All pages shall be single spaced and printed on one side only. Margins shall be no less than ¾" around the perimeter of each page. Each page shall be numbered. Electronic files (compact disks and/or computer disks) shall be included as part of the application as designated on the Application Checklist (Attachment A). Each Application must include the sections and attachments in the sequence listed in the Application Requirements Section. Failure to meet the above conditions may result in disqualification of the Application.
- 5.5 Respondents who submit responses to this RFQ shall correctly reveal, disclose, and state the true and correct entity, individual, proprietorship name, corporate name, and /or partnership name (clearly identifying the responsible general partner and all other partners who would be associated with the Contract, if any). No nick-names, abbreviations (unless part of the legal title), shortened or short-hand, or local "handles" will be accepted in lieu of the full, true and correct legal name of the entity. These names shall comport exactly with the corporate and franchise records of the Texas Secretary of State and Texas Comptroller of Public Accounts. Individuals and proprietorships, if operating under other than an individual name, shall match with exact Assumed Name filings.
- If a staff recommendation is made to award the Contract to any entity that is later found to have incorrectly or incompletely stated its name or failed to fully reveal its identity in its application, the Director of the Department of Community Initiatives or designee shall have the discretion, at any point in the contracting process, to suspend consideration of the application, or to terminate a Contract, if already awarded.
- 5.6 All provisions in Respondent's application, including any estimated or projected costs, shall remain valid for the term of the RFQ process (October 1, 2007 through September 30, 2008).
- 5.7 All applications become the property of the City upon receipt and will not be returned. Any information deemed to be confidential by Respondent should be clearly noted on the page(s) where confidential information is contained; however, the City cannot guarantee that it will not be compelled to disclose all or part of any public record under the Texas Public Information Act, since information deemed to be confidential by Respondent may not be considered confidential under Texas law, or pursuant to a Court order.
- 5.8 Any cost or expense incurred by the Respondent that is associated with the preparation of the application or during any phase of the selection process, shall be borne solely by Respondent.

VI. EVALUATION CRITERIA

Criteria to be evaluated shall include the items listed below. The City may select all, some or none of the Respondents for interviews. The City reserves the right to select one, or more, or none of the Respondents to provide services.

Evaluation criteria:

6.1 Economic evaluation of the Proposed Fee Schedule

6.2 Respondent's capability to provide the services requested and information contained in the Respondent's application.

6.2.1 Background of Respondent and support personnel, including professional qualifications and length of time working in Respondent's capacity.

6.2.2 Relevant experience of Respondent.

6.2.3 Specific experience with public entity clients, especially large municipalities.

6.2.4 Resources available to support this project, including total number of employees, number and location of offices, number and types of equipment available.

6.2.5 References of Respondent.

6.3 Services to be purchased – Proposed approach and appropriateness of services

VII. AWARD OF CONTRACT AND RESERVATION OF RIGHTS

7.1 City reserves the right to award one, more than one or no Contract(s) in response to this RFQ.

7.2 The Contract, if awarded, will be awarded to the Respondent(s) whose Qualification(s) is deemed most advantageous to City, as determined by the City.

7.3 City may accept any application in whole or in part. If subsequent negotiations are conducted, they shall not constitute a rejection or alternate application on the part of City.

7.4 City reserves the right to accept one or more applications or reject any or all applications received in response to this RFQ, and to waive informalities and irregularities in the applications received. City also reserves the right to terminate this RFQ, and reissue a subsequent solicitation, and/or remedy technical errors in the RFQ process.

7.5 If selected, Respondent shall execute a Contract, in substantially the form attached hereto and incorporated herein as Attachment H no later than ten (10) calendar days after notice of Contract award. No work shall commence until the Contract document(s) is signed by City and Respondent(s) provides the necessary evidence of

insurance as required by the Contract. Contract documents are not binding on City until approved by the City Attorney. In the event the parties cannot negotiate and execute a Contract within the time specified, City reserves the right to terminate negotiations with the selected Respondent and commence negotiations with another Respondent.

7.6 This RFQ does not commit City to enter into a Contract, award any services related to this RFQ, nor does it obligate City to pay any costs incurred in preparation or submission of an application or in anticipation of a Contract.

7.7 Chapter 176 of the Texas Local Government Code requires that persons, or their agents, who seek to contract for the sale or purchase of property, goods, or services with the City, shall file a completed conflict of interest questionnaire with the City Clerk not later than the 7th business day after the date that the person: (1) begins contract discussions or negotiations with the City; or (2) submits to the City an application, response to a request for proposals or bids, correspondence, or another writing related to a potential agreement with the City. The conflict of interest questionnaire form is available from the Texas Ethics Commission at www.ethics.state.tx.us. Completed conflict of interest questionnaires may be mailed or delivered by hand to the Office of the City Clerk. If mailing a completed conflict of interest questionnaire, mail to: Office of the City Clerk, P.O. Box 839966, San Antonio, TX 78283-3966. If delivering a completed conflict of interest questionnaire, deliver to: Office of the City Clerk, City Hall, 2nd floor, 100 Military Plaza, San Antonio, TX 78205. Please consult your own legal advisor if you have questions regarding the statute or form. DO NOT SUBMIT THIS FORM TO THE DEPARTMENT OF COMMUNITY INITIATIVES.

VIII. SCHEDULE OF EVENTS

Following is a list of **projected dates** with respect to this RFQ:

RFQ Solicitation Period.....October 1, 2007 through September 30, 2008

Evaluations Conducted.....Continually throughout solicitation period

Contracts Awarded.....As needed throughout solicitation period