



818 S. FLORES ST. ① SAN ANTONIO, TEXAS 78204 ① www.saha.org

Procurement Department

REQUEST FOR QUOTATIONS

For

Facilitator for Executive Retreat

For

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

**RFQ #: 1001-924-64-3117
Closes February 5, 2010 @ 11:00 AM**

Prepared by:

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

President and CEO..... Lourdes Castro Ramirez

January 2010

Request for Quotes 1001-924-64-3117

- 1.0 **SAN ANTONIO HOUSING AUTHORITY (SAHA) CONTACT:** All questions pertaining to this quotation shall be addressed to Carl Bottoms, Procurement Supervisor, telephone 210-477-6165, fax 210-477-6167 or e-mail at carlton_bottoms@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*, HUD Handbook 7460.8 REV 2, Procurement Handbook for Public Housing Agencies, dated 2/2007, and SAHA General Terms and Conditions. These documents may be obtained by contacting Carl Bottoms, Procurement Supervisor, telephone 210-477-6165, fax 210-477-6167 or e-mail at carlton_bottoms@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 an award to the same bidder (aggregate) for all items; or,
 - 3.5.2 To make an 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, 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 thirty (30) 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. PO's will be issued on an as-needed basis only. By submitting a bid, the successful bidder thereby agrees to confirm receipt of the PO in the manner directed by SAHA.
- 8.0 AWARD CRITERIA:** If an award is completed pursuant to this Solicitation, and unless otherwise instructed by SAHA, an award shall be made to the responsive and responsible contractor that submits the best value to SAHA using price and other factors listed below.

Contractor will be evaluated based on the following criteria. Please include information that addresses these areas in your response.

- Past Experience in planning and goal setting
- Experience developing measurements to track performance of goals
- Past experience with public housing or community development industry
- Cost (lump sum)
- Facilitator's Resume
- Current Client References (within past year)
- Approach to facilitating team building, brainstorming, implementation of goals and establishing performance metrics.

- 9.0 COST:** Cost shall be a firm fixed price inclusive of all elements required to deliver the service and the cost proposed shall be fully "burdened" with profit, overhead, and travel.

SAHA will provide the following which shall not be included in the cost.

- Lodging will be provided for February 17th
- February 17th Lunch and Dinner will be provided
- February 18th Breakfast and lunch will be provided
- Snacks will also be provided

SAHA will not be responsible for paying any additional expenses or fees in the completion of this project.

- 10.0 BID COSTS:** 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.

- 11.0 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.
- 12.0 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 ensuing 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.
- 13.0 SPECIFICATIONS /SCOPE OF WORK FOR THIS SOLICITATION:**
- 13.1** The Executive Retreat will be held at The Gruene Mansion Inn, 1275 Gruene Road, New Braunfels, TX.
- 13.2** Date of retreat: Half day February 17th and full day February 18th.
- 13.3** SAHA is seeking a resource for a contract period of ninety days from receipt of Purchase Order to facilitate the retreat and to assist Senior Staff prior to and after the sessions to finalize the set of deliverables and establish measurements to track performance. Facilitator must be available seven days prior to the retreat to assist the Senior Staff and review the draft goals and plans. The Facilitator must be available for the duration of the contract to assist Senior Staff with performance goals and planning. The Facilitator shall prepare a final report within two weeks following the retreat that defines the deliverables and measurements established during the retreat.
- 13.4** The Facilitator will conduct goal setting (planning) and team building sessions with the Senior Staff of SAHA.
- 13.5** The successful Facilitator will lead discussions that result in SAHA's draft goals being converted into a document that allows SAHA to focus on the key strategic initiatives by department and identifies objectives and how they will be measured. The draft goals and plans will be available to be reviewed by the Facilitator prior to the retreat.
- 13.6** The group will explore methods of cultivating an atmosphere that leads to building team commitment through collaboration, involvement, information sharing and creativity. The facilitator will guide the Senior Staff in establishing shared goals and engendering commitment to those goals.

13.7 Emphasis will be on providing an interactive forum to explore different approaches that address SAHA's priorities and establish goals and develop methods to measure performance.

13.8 SAHA's Key Priorities

- Improve the quality of life for our clients
- Expand and preserve affordable housing
- Strengthen our basic internal systems, services and staff capacity

13.9 Response must be received no later than 11:00AM February 5, 2010. Responses may be hand delivered to:

**San Antonio Housing Authority,
attn. Carl Bottoms, Procurement Supervisor,
818 S. Flores, San Antonio, TX 78204.**

Faxed to: Attn. Carl Bottoms at 210-477-6167

Emailed to: carlton_bottoms@saha.org

14.0 Invoicing: Invoices shall be sent to: San Antonio Housing Authority, Accounts Payable, P.O. Box 830428, San Antonio, TX 78283-0428 or may be e-mailed to AccountsPayable@saha.org. Contractor shall invoice SAHA within 60 days after the delivery of the goods or service. If contractor fails to invoice within 60 days SAHA reserves the right to not pay the invoice.

15.0 Fair Labor Standards Act: Both parties hereby agree to comply with the provisions of the Fair Labor Standards Act (29 U.S.C. 201, et seq).

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Quote Form

RFQ Closes at 11:00AM February 5, 2010

1001-924-64-3117 Facilitator for Executive Retreat

1. Cost to provide Facilitator as defined in this RFQ \$_____

2. Sub-Contractors: Proposer shall identify his sub-contractors if any:

a) _____

b) _____

In submitting this bid, it is understood if written notice of the acceptance of this bid is mailed, e-mailed, or delivered to the undersigned within sixty (60) days after the opening thereof, or at any time thereafter before this bid is withdrawn, the undersigned agrees to execute and deliver the products and/or services 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)

Directions to the Mansion in Gruene, Texas:

From I-35

- Take exit 191 toward Canyon Lake (west).
- Go 1.5 miles to the light at Hunter Road and turn left
(a landmark is the red-and-white beer barn called Jak's).
- Go about one mile until the road dead-ends at Gruene Hall.
- Turn left, the Gruene Mansion Inn is the first building on the right.

From IH-10 (Houston)

- Take IH-10 west towards San Antonio
- Exit # 607 in Seguin and head west on Hwy 46 towards New Braunfels
- Cross under IH-35; turn right at 2nd stop light on Common Street
- Turn left at 4-way stop on Gruene Road
- We are located about 1.5 miles on left hand side on Gruene Road