



ADDENDUM # 2

To: 1105-958-16-3519

RFP for: Strategic Planning Facilitation Services

The following questions have been asked:

- Question 1:** Numerous agency plans are posted on SAHA's website. Are there other current internal Strategic Plans that may be made available to prospective contractors?
- Answer 1:** Formal strategic planning has been sparse over the last 10 years, but the recently adopted Affordable Housing Preservation and Expansion Policy is available.
- Question 2:** May prospective contractors have copies of any progress reports available on achievement of goals stated in plans?
- Answer 2:** We are in the early stages of implementation of the Affordable Housing Preservation and Expansion Policy, so no progress reports exist, yet.
- Question 3:** SAHA's website posts a link to the PHA's 2011-2012 MTW Annual Agency Plan Pending HUD Approval. The link appears to be broken. Will SAHA provide a copy of this document to prospective contractors?
- Answer 3:** Yes.
- Question 4:** Are there stakeholder groups not referenced in the RFP that will be called upon for input during the Strategic Planning process?
- Answer 4:** The list of stakeholder groups in the RFP is not meant to be exhaustive, and additional stakeholder groups should be engaged as they present themselves. We intend the selected facilitator to assist in brainstorming additional stakeholder groups.
- Question 5:** Do the PFCs and Financial Corporation have independent mission and vision statements that will be provided to prospective contractors?
- Answer 5:** No.
- Question 6:** Section 3.6.3.1.2 states that the selected contractor is to analyze and report shared priorities, goals and market analyses, for recently completed strategic plans of local agencies, including VIA Metropolitan Transit Authority, San Antonio Independent School District (SAISD), Centro San Antonio, etc. Would SAHA provide guidance as to additional recently completed strategic plans to be included in the analysis and reporting?
- Answer 6:** The stated list includes agencies that have completed recent strategic planning processes, but is not meant to be exhaustive.



Question 7: 3.6.3.3 speaks to Public community meetings, follow-up interviews and surveys. Does SAHA have historical information available as to the targeted community groups and overall number of meetings required?

Answer 7: SAHA has not established a minimum number of groups or meetings, based on historical experience or otherwise. Instead, SAHA is looking to consultant expertise to establish appropriate engagement levels.

Question 8: Last fall, SAHA advertised a position for a Senior Policy and Planning Manager. The job description indicates this position oversees and coordinates the strategic plan and researches and analyzes related data. Has that position been filled?

Answer 8: Yes.

Question 9: Has SAHA estimated a target budget range for this project?

Answer 9: While we have internal estimates, we look to the proposals to establish a firmer range.

Question 10: Section 1.7, page 8, last sentence, "...contractor is advised the facilitation must be completed within 120 days of notice to proceed." Since facilitation is part of Stage 1 and Stage 2, must the facilitation in both be completed within 120 days? What is driving the 120 day completion?

Answer 10: The 120-day clock starts ticking when the first milestone of Stage 1 is complete -- the first meeting of the Board of Commissioners. From that point, Stage 1 and Stage 2 both need to complete within 120 days.

Question 10: Section 3.9, page 14, The time for completion is estimated at not more than 120 days and implies the entire project must be completed, whereas Section 1.7 indicates completing the facilitation is required within 120 days. Please clarify.

Answer 10: Please see above answer.

Question 11: What was the approximate cost for the SAHA Board Retreat, February 5, 2011? Is the firm that conducted the February retreat eligible to bid on this project?

Answer 11: This part of the question has been forwarded to our Open Records section in our Legal Department. Yes the firm that conducted the February retreat may bid.

Question 12: How much has been budgeted for this project?

Answer 12: See answer 9 above.

Question 13: If the SAHA Board approves the contract award in August, what is the anticipated project start-up date or timeframe?

Answer 13: After September 1.

Question 14: Attachment C, Profile of Firm Form. Question 9 requests the firm's City of San Antonio Business License No. Does the firm need to have this license prior to submitting a proposal?

Answer 14: If it is required, the license would need to be obtained prior to contract execution by the Contractor.



The following questions were asked at the pre-submittal meeting on June 21, 2011.

Question 15: Does the certificate of insurance need to be included with the bid?

Answer 15: No, it is required prior to executing the contract.

Question 16: Is it possible to get source forms so answers can be typed into them directly?

Answer 16: We do not have source forms at this time. Some of the forms on HUDclips.org are now editable but we cannot guarantee all are.

Question 17: Do we need to supply proof of insurance coverage for Joint Venture, Partners and subcontractors?

Answer 17: We will require proof of insurance that covers either a joint venture or a partnership. The coverage of a subcontractor is a business decision by the Contractor and depends on what level of protection the Contractor wants. SAHA will look to the Contractor's coverage for any claims.

Question 18: What if there are no plans or potential for new hires under Section 3?

Answer 18: The Proposer shall indicate this in their plan; however, the Proposer shall also indicate what efforts it will undertake in the other areas covered by the Section 3 Program such as training and/or educational efforts.

Question 19: Please provide some examples of Section 3 efforts undertaken by others.

Answer 19: Some of the efforts from other Proposers have included, training in specific job skills such office assistance, or trades, job shadowing, and teaching of specific skills (ex. Resume writing).

Question 20: Will SAHA help locate qualified individuals?

Answer 20: Yes.

Question 21: Reference Section 3.6.3.2 of the RFP are you talking about an actual asset inventory or more of a general approach?

Answer 21: We are looking more for the approach to insure all stake holders at all SAHA assets are given the opportunity to be represented.

Question 22: Reference Section 3.6.3.3.1 Do you want the actual venue arrangements and logistics or are you looking for the methodology to address those items?

Answer 22: Methodology.

Question 23: There seems to be a conflict on the contract time. One section says 1 year but that the facilitation must be complete within 120 days, and another section states that the time for completion is estimated at not more than 120 days. Please clarify.

Answer 23: Our contracts are generally termed for a period of one year with extension as an option at SAHA's discretion. This facilitates the ability to extend the time if it becomes necessary. The 120 days is the actual time frame to complete the job requirements of this RFP and is further clarified in Answer 10 above.



Question 24: How many copies of the printed and hardbound final report are required and how many copies in the editable digital form and what format is required?

Answer 24: SAHA requires ten (10) copies of the printed report, and one (1) copy in an editable digital format.

The following questions were asked after the pre-submittal meeting on June 21, 2011.

Question 25: Please elaborate on the SAHA hiring percentage of 3% of SAHA residents as professional staff on this project. Does this mean that a company is required to hire a SAHA resident in order to be responsive to this bid and to be considered for procurement?

Answer 26: The “**Good Faith Effort**” hiring goal for all contracts is 30% of all new hires. It does not require you to hire personnel to be responsive or be considered.

Question 27: Does this bid require a company to hire a SAHA resident even if the company already has sufficient staff to meet the objectives of this procurement?

Answer 27: The hiring goal applies only if additional personnel are required or needed to properly complete the work. Any prospective candidate regardless of their Section 3 status would still need to meet your employment standards; however, the section 3 qualified individual should be given preference over non-Section 3 if all else is equal.

Question 28: What scoring weight does meeting the hiring percentage represent during scoring?

Answer 28: The Section 3 utilization plan has a weight of 15% in the scoring criteria.

The pre-submittal attendance is attached.

By: *Charles R Bode*
Charles Bode Asst. Director of Procurement

Date: June 24, 2011

SIGN IN SHEET

Strategic Planning Pre-submittal Meeting

June 21, 2011 - 10:00 am

1105-958-16-3519

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