

ADVERTISEMENT INFORMATION ONLY

Solicitation Type and Name: **Request for Proposals – Investment Consulting & Investment Training Services**

Solicitation Number: RFP 24-134; RFx 6100018279

Description: The Finance Department is seeking the professional services of an Investment Consultant (“Consultant” or “Respondent”) to assist in providing investment consulting and investment training services. The primary role of the Consultant is to provide objective, third-party advice, and counsel that will enable the City to make well-informed and educated decisions regarding the investment of the City’s financial assets.

Applicable Product Categories: **91849-** Finance and Economics Consulting

Date Issued: July 15, 2024

Due Date & Time: August 14, 2024, 11:00 a.m. Central Time

Pre-Submittal Conference: Pre-Submittal Conference will be held at 11:00 a.m., Central Time, on July 19, 2024, via WebEx. Attendance at the Pre-Submittal Conference is optional, but highly encouraged.

Respondents may call the toll-free number listed below and enter access code to participate the day of the conference.

Dial-In Number: 1-415-655-0001 | **Access Code:** 2634 616 0281 | **Meeting Password:** pDfYww7dY72

Join from the meeting link:

<https://sanantonio.webex.com/sanantonio/j.php?MTID=m3f54d929c7c825a2881f5971333ca796>

Staff Contact Person: Debra Light, Procurement Specialist III, Debra.Light@sanantonio.gov

Evaluation Committee Voting Members:

Margaret U. Villegas, Assistant Director, Finance Department

Alejandro Tijerina, Financial Management Administrator, Finance Department

Brett Sekula, Investment Officer, Finance Department

Rozeanne Cantu, Financial Manager, Finance Department

Pursuant to Section 011 – Restriction on Communications and in accordance with and as authorized by Section 2-61 of the City Code, the following restrictions on communications apply to this solicitation: Respondents are prohibited from contacting 1) City officials, as defined by §2-62 of the City Code of the City of San Antonio, regarding the RFP or proposal from the time the RFP has been released until the contract is posted for consideration as an agenda item during a meeting designated as an A session; and 2) City employees from the time the RFP has been released until the contract is approved at a City Council “A” session.

Exceptions to the Restrictions on Communications:



Respondents may submit written questions concerning this RFP to the Staff Contact Person listed below until **4:00 p.m., Central Time, on July 25, 2024**. Questions received after the stated deadline will not be answered. All questions shall be sent by e-mail. Questions submitted and the City's responses will be posted with this solicitation.

Debra Light, Procurement Specialist III
City of San Antonio, Finance Department – Procurement Division
Debra.Light@sanantonio.gov

To view this solicitation, go to the SAePS portal; <https://supplierservice.sanantonio.gov/iri/portal>. If you have not completed the City's SAePS Vendor Registration, you must do so in order to view the solicitation and submit a response. Once you have logged on to the SAePS portal, click on "My Bids" (first), if not viewable then click "Other Bids" (to view all already published competitive bids). Vendor Guides & Support can be accessed from this link:

<https://www.sa.gov/Directory/Departments/Finance/About/Divisions/Procurement/Resources/Guides-Support>

TO REGISTER: You will need to complete the vendor registration by accessing the SAePS Vendor Registration at

<https://www.sa.gov/Directory/Departments/Finance/About/Divisions/Procurement/Become-a-Vendor>.

Questions regarding registration may be submitted to Vendor Support at (210) 207-0118 or by email at vendors@sanantonio.gov with "SAePS Portal" on the subject line so this can be expedited.

