



## **REQUEST FOR QUALIFICATIONS (RFQ)**

### **REHABILITATION CONSTRUCTION CONTRACTORS FOR REHABARMA PROGRAM RFQ#: 2024-055**

**Release Date: February 21, 2024  
Proposals Due: March 22, 2024, at 10:00 AM Central Time (CT)**

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#### **RESTRICTIONS ON COMMUNICATIONS**

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 RFQ or submittal from the time the RFQ 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 RFQ has been released until the contract is approved at a City Council "A" session.

Restrictions extend to "thank you" letters, phone calls, emails and any contact that results in the direct or indirect discussion of the RFQ and/or proposal submitted by Respondent.

Violation of this provision by Respondent and/or its agent may lead to disqualification of Respondent's submittal from consideration.

For additional information, see the section of this RFQ entitled "Restrictions on Communication".

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**ATTACHMENTS**

SBEDA Ordinance Contract Provisions	Exhibit A
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**Required Forms (to be uploaded individually in CivCast):**

Submittal Checklist and Table of Contents	Form 1
Submittal Cover/Signature Sheet	Form 2
Contracts Disclosure Form	Form 3
Litigation Disclosure Form	Form 4
SBEDA: Subcontractor/Supplier Utilization Commitment Form	Form 5
Local Preference Program (LPP) Ordinance Identification	Form 6
Veteran-Owned Small Business (VOSB) Tracking Form	Form 7

# REHABILITATION CONTRACTORS FOR REHABARMA PROGRAM (RFQ#: 2024-055)

## I. BACKGROUND

The City of San Antonio (City), Office of Historical Preservation (OHP) is issuing a Request for Qualifications (RFQ) seeking Statement of Qualifications (SOQ) from interested professional construction firms (Respondents) for construction services for the Rehabilitation Contractors for Rehabarama Program (Project).

The City intends to award up to five (5) contracts, as a result of this RFQ; however, the final number of awarded contracts will be determined by the number of proposals received and the outcome of evaluation process. This contract shall begin upon the effective date of the executed Professional Services Agreement (PSA) and shall terminate on September 30, 2024. The City hereby establishes the maximum aggregate contract price of \$500,000.00 for this solicitation. Each contract is anticipated to be for an amount not to exceed \$25,000.00 per contract. The City does not guarantee the entire contract capacity amount will be spent under these on-call contracts, any number of works to be authorized, or any dollar value of jobs, tasks or purchase orders allocated for each contract. Work will be performed on an as needed basis and the execution of a contract does not guarantee the issuance of work/task orders during the term of the contract.

Administered by the Office of Historic Preservation, REHABARAMA is a minor repair program that focuses on building the hands-on preservation trades and emphasizes retention and preservation of original building materials and architectural character. Qualified participants (homeowners) are eligible to receive assistance with home repair and maintenance projects focused on prolonging the useful life of the home and maintaining a living environment that is safe, dry, and warm. The program focuses on the preservation of historic and aging housing stock to allow for aging in place and generational wealth. Selected contractors will need to demonstrate the capability and the proven experience to perform housing minor rehabilitation services for up to 30 qualified homeowners.

## II. SCOPE OF WORK AND GENERAL REQUIREMENTS

- A. Contractor(s) shall provide rehabilitation and reconstruction services for qualified homeowners participating in programs managed by OHP in a mutually agreed upon format. Contractor will not be guaranteed a minimum quantity of projects or guarantee in the compensation. However, the goal is to establish how many projects a contractor will qualify for based on the number of qualified contractors available to meet goals. Contractors selected through this RFQ will be placed on a list of pre-approved contractors to utilize for residential home rehabilitation programs.
- B. Each home is assessed to determine the rehabilitation needs. The assessment is based on a site visit accompanied with OHP staff. Qualifying scopes of work include repair and maintenance projects to address one or more of the following:
  - Building envelope (siding, soffit, fascia, roof penetrations, skirting)
  - Structural systems (minor foundation/shimming, stabilization, reinforcement of structural elements, masonry)
  - Non-compliance with property maintenance code issues
  - Weatherization & comfort (wood window repair, windows screens, door repair, insulation)
  - Longevity (scraping, caulking, painting, flashing, gutter repair)
  - Safety (porch repair & decking, accessibility)
- C. The following scope of services is not intended to be a complete list of all services needed. The scope of work for each home will be developed on a project-by-project basis:
  1. OHP staff will select a contractor to complete a project scope of work as developed by City staff. Projects will be awarded based on contractor capacity and experience, impact of proposed rehabilitation on the services provided, readiness to proceed and financial feasibility.
  2. Selected contractor(s) will conduct property inspections and create a cost estimate with a line item for each item for the project scope of work developed in coordination with City staff. Each line item must meet the specifications as determined by City staff.
  3. Selected contractor(s) will perform rehabilitation work as determined in the scope of work developed by the City. Rehabilitation scopes of work and project spending limits are capped at \$25,000 for each minor repair/rehabilitation project. It is imperative that Respondents understand the City's spending limit policies and the utilization of cost estimating software RS Means (or a comparable industry standard) to arrive at an approved scope of work and project costs to adhere to spending policies. These amounts are subject to change based on City Council policies. RS Means updates quarterly to account for

variability in costs and market conditions for labor and materials. The City does not allow for inclusion of General Conditions costs in the approved Scope of Work. These amounts may be adjusted by the City at any time based upon the City's budget and priorities.

4. A critical component to the REHABARAMA program is the integration of volunteer service and donated/salvaged materials to offset individual project costs. For each project, the contractor is responsible for identifying scopes of work that can be completed by volunteer groups in a single-day, or two-day volunteer event. Contractors will also work with City staff on developing a materials list. City staff will seek in-kind donations or identify available reclaimed materials for use in projects. The availability of free materials should be removed from individual project bids.
5. The City of San Antonio shall inspect rehabilitation work on a regular basis as outlined in the proposal to ensure that selected contractor(s) is performing pursuant to the scope of work outlined in the contract and adhering to the City building codes and rehabilitation standards.
6. The selected contractor must prepare all necessary documents required for the final inspection of rehabilitation work and issue a final acceptance of work signed by the selected contractor and the homeowner. A copy of this notice must be provided with the final Request for Payment.
7. The selected contractor will prepare and submit to the City a Request (draws) for payment along with supporting documentation for reimbursement. Incomplete submissions will not be processed for payment.
8. Selected contractor(s) should relay in the proposal the specific volume of units they are able to undertake over a 9-month period with the goal of completion on or before September 30, 2024. Contractor are not expected to have capacity to complete the total number of projects. Instead, the City would like contractor to describe their individual capacity. The City estimates the number of projects to be completed with funding from the General Funds.
9. Selected contractor(s) can prepare and submit for homeowner and City approval change orders, as necessary. Change orders must be pre-approved by homeowner and City before work is authorized to be initiated to ensure adherence to spending policies.
10. Selected contractor(s) must secure all manufacturers and supplier warranties prior to final payment for rehabilitation work and provide them to the homeowner.
11. Selected contractor(s) must perform all duties as required by their agreement and in accordance with this RFQ.
12. Selected contractor(s) is responsible for ensuring that all Subcontractors, if applicable, adhere to the requirements of Housing Rehabilitation Standards, as well as adhere to all local construction requirements and building codes.
13. Selected contractor(s) must ensure all programmatic, fiscal and staff records are available for monitoring and site visits upon request. With respect to all matters covered by this solicitation, all records will be made available for examination, audit, inspection or copying purposes at any time during normal business hours and as often as the City may require.
14. Selected contractor(s) must ensure that cost reasonableness is documented, and the information will be reviewed as part monitoring if necessary. Cost reasonableness will be measured by the City with a comparison of contractor cost estimate against the City's cost estimate. Variances between the cost estimates may require further clarification and/or negotiation between the City and the Contractor. Rehabilitation contracts between the homeowner(s) and the selected contractor(s) will be firm fixed contracts approved by the City. Change orders will be reviewed in order to address unforeseen circumstances not accounted for in the scope of work.
15. Selected contractor(s) will secure and pay for all necessary construction permits and licenses required to perform the work and to adhere to applicable local codes and requirements whether or not covered by the specifications and drawings for the work. Contractor is expected to know and be familiar with all applicable city codes, permitting and inspection requirements and other legally required construction standards applicable to the work being performed on the home.
16. Selected contractor(s) are required to provide, not less than a full one (1) year warranty to the homeowner, which shall extend to subsequent owners of the property. The warranty shall provide that improvements, hardware, and fixtures of whatever kind or nature installed or constructed on the property by the contractor are of good quality typically recognized among the residential construction industry and free from defects in workmanship or materials or deficiencies. The one (1) year warranty period begins at the time of the final inspection. Selected contractor(s) recognize that in addition to the warranty provided herein, the contractor(s) are subject and shall be held to the implied warranty of good and workmanlike repairs required under Texas law.
17. The contractor will enter into a written contract with the homeowner, and approved by the City, that complies with applicable federal, state and local statutes, regulations and ordinance, and all applicable program-specific requirements.

18. The contract between the homeowner and the contractor may be terminated by the homeowner, upon written notice, at any time for nonperformance which may include but is not limited to work that does not comply with the scope of work, specifications, local housing codes or the contract time of performance or by the contractor, upon written notice, for non-cooperation or interference by the homeowner. The contract between the homeowner and contractor may not require the homeowner to incur or advance any expense.
19. All contracts for rehabilitation services funded by the General Funds are required to comply with all applicable federal, state, and local laws, regulations, and ordinances, and are also subject to the City’s program-specific requirements.
20. As such, Respondents agree to provide the services in accordance with all applicable federal, state, and local laws, standards and regulations, including but not limited to the following:
21. Respondent acknowledges, understands, and agrees to comply to with Title VII of the Civil Rights Act of 1964 (Title VII), which prohibits employment discrimination based on race, color, religion, sex, or national origin.
22. Respondent acknowledges, understands, and agrees to comply to with the Equal Pay Act of 1963 (EPA), which protects men and women who perform substantially equal work in the same establishment from sex- based wage discrimination.
23. Respondent acknowledges, understands, and agrees to comply to with the Age Discrimination in Employment Act of 1967 (ADEA), which protects individuals who are forty (40) years of age or older.
24. Respondent acknowledges, understands, and agrees to comply to with Title I and Title V of the Americans with Disabilities Act of 1990, as amended, which prohibit employment discrimination against qualified individuals with disabilities in the private sector, and in state and local governments.
25. Respondent acknowledges, understands, and agrees to comply with the requirements of the City’s Small Business Economic Development Advocacy (SBEDA) Program. Respondent is required to contact city staff or the City’s Economic Development Department to receive more information on this process.

### III. SCHEDULE OF EVENTS

The following tentative schedule has been prepared for this project:

<b>Pre-Submittal Conference:</b>	<b>March 1, 2024, CT, 9:30 am, CT</b>
<b>Deadline for Submission of Written Questions:</b>	<b>March 6, 2024, 4:00 pm, CT</b>
<b>Responses Due:</b>	<b>March 22, 2024, 10:00 am, CT</b>
<b>Interviews, if necessary</b>	<b>April 2024</b>
<b>Anticipated City Council Consideration</b>	<b>May 2024</b>

### IV. PRE-SUBMITTAL CONFERENCE

A non-mandatory Pre-Submittal Conference is scheduled, for **March 1, 2024 at 9:30 a.m.** CT. The Pre-Submittal Conference will be held via WebEx meeting. Prospective Respondents may join the WebEx using the following instructions:

**Join by phone:** 1-415-655-0001

**Meeting number (access code):** 2633 571 7681

**Meeting password:** COSA

**Join meeting:** <https://sanantonio.webex.com/sanantonio/j.php?MTID=me7d67d555ae833bcff3cfd1c43274f9b>

Attendance at the Pre-Submittal Conference is optional, but highly encouraged. Respondents who join the WebEx Pre-Submittal Conference are required to sign into the meeting using a QR code provided only during the meeting. This will confirm Respondent’s attendance and participation for the Pre-Submittal meeting through WebEx.

Respondent is encouraged to submit written questions concerning this RFQ through the CivCast website at least five (5) calendar days in advance of the Pre-Submittal Conference, in order to expedite the proceedings. City’s responses to questions received by this due date may be distributed at the Pre-Submittal Conference, as well as being posted on the CivCast website at <https://www.civcastusa.com/bids>.

City’s responses to questions received by this due date may be discussed at the Pre-Submittal Conference, as well as being posted on the CivCast website at <https://www.civcastusa.com/bids>.

Any oral responses provided by City staff at the Pre-Submittal Conference shall be preliminary. A written summary of the Pre-Submittal Conference shall contain City's official responses to issues raised during the Pre-Submittal Conference and posted on the CivCast website at <https://www.civcastusa.com/bids>. Any oral response given at the Pre-Submittal Conference that is not confirmed in the posted written summary from the Pre-Submittal Conference or in a subsequent addendum shall not be official or binding on City. Only written responses shall be official. All other forms of communication with any officer, employee or agent of City shall not be binding on City.

## V. SUBMITTAL DOCUMENT REQUIREMENTS AND EVALUATION CRITERIA

City will conduct a comprehensive, fair and impartial evaluation of all proposals received in response to this RFQ. City will appoint a selection committee to perform the evaluation of the received Statement of Qualifications (SOQ). Each SOQ received by City shall be analyzed to determine overall responsiveness and qualifications to the RFQ. The selection committee may select Respondents who are judged to be reasonably qualified for interviews, depending on whether further information is needed. Interviews are not an opportunity to change a submission. If the City elects to conduct interviews, Respondents may be interviewed and re-scored based upon the same criteria. City may also request information from Respondents at any time prior to final approval of a selected Respondent or seek best and final qualifications from Respondents deemed reasonably qualified for award. Final approval of a selected Respondent is subject to the action of the San Antonio City Council.

Respondent's SOQ shall include the following items included in the Submittal Checklist & Table of Contents (**Form 1**) in the following sequence combined in PDF format:

1. **SUBMITTAL CHECKLIST AND TABLE OF CONTENTS (Form #1) (Indexed and labeled as "Tab 1")** – Respondent and respondents team members shall complete this form, which shall be used as the Table of Contents and as a checklist for Respondent's submittal.
2. **EXECUTIVE SUMMARY (Indexed and labeled as "Tab2")** – Respondent shall include a one (1) page Executive Summary at the beginning of the Statement of Qualifications. Respondent's Executive Summary shall state the number of years Respondent's team has been in business, Respondent's number of years in business in its local office, Respondent's local office address and the number of employees employed in Respondent's local office.

To correctly submit a response to this RFQ, Respondent shall reveal, disclose, and state the true and correct name of the individual, proprietorship, corporation and/or partnership (clearly identifying the responsible general partner and all other partners who would be associated with the contract, if any) submitting the response. The true and correct name should 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, should match with exact Assumed Name filings. Corporate Respondents and limited liability company Respondents shall include the 11-digit Comptroller's Taxpayer Number on the signature page of the RFQ Submittal

3. **LETTERS OF REFERENCE (required) (Indexed and labeled as "Tab 3")** – Respondent shall provide a maximum of five (5) letters of reference.
4. **STATEMENT OF QUALIFICATIONS** – Respondent shall provide a narrative document, as outlined in the **Statement of Qualifications** below, addressing all evaluation criteria in **Section V** of this RFQ considering the project defined in this solicitation. Sufficient information regarding Respondent's past projects and key personnel's experience shall be provided in Respondent's proposal. to indicate its team has met or exceeded the minimum qualifications provided in **Section V** of this RFQ in proposal.

The following Evaluation Criteria shall be used, in recommending the award of this Contract:

### A. Experience, Background, Qualifications of Firm, Key Personnel, and Key Sub-Contractor (45 Points)

Respondent shall respond to the following items, as they relate to Scope of Work:

1. **Experience (Indexed and Labeled as "Tab 4")** – City shall consider the relevance of past experience of Respondent and respondents team members. Respondent shall provide a narrative, one (1) page, describing the Respondent's qualifications, as they relate to the referenced scope of services in this solicitation. **Special attention should be given to experience of similar size and complexity as reflected in the scope of work.**
2. **Project Sheets (Indexed and Labeled as "Tab 5")** – Respondent's SOQ shall include a maximum of three (3)

project sheets, limited to one (1) page for each project included, which shall describe similar rehabilitation projects Respondent has completed within the last five (5) years. Each project sheet shall include the following:

1. Name, description and dollar value of the completed project, including any similarity to the Project defined in this solicitation;
  2. Year(s) of work on the cited project;
  3. Respondent's role in the cited project;
- 3. Proposed Key Personnel/Organizational Chart (Indexed and Labeled as "Tab 6")** – Provide a detailed organizational chart of Respondent's proposed team, including subcontractors, identifying key personnel who will be committed to work on the various tasks for this Contract.

Label assignments as:

- a. Principal/Partner;
  - b. Project Manager(s);
  - c. Subcontractor (for any services deemed necessary to fulfill the duties of this contract)
- 4. Resumes (Indexed and Labeled as "Tab 7")** – Respondent must submit one (1) page resumes for all its key team members, to include subcontractors. Resumes should link to project sheets and also may include additional previously completed relevant projects not highlighted in the project sheets.

Resumes also shall include:

- a. The license type (if applicable) and number of years licensed,
  - b. Number of years employed with the firm,
  - c. Number of years' experience in proposed role corresponding to the assignments included in the organizational chart,
  - d. City of residence
- 5. Experience and Commitment with Green Building and Sustainability Practices (Indexed and Labeled as "Tab 8")**

Respondent shall limit its response to the following items to a total of one (1) page.

- a. Describe Respondent's experience in the design of buildings or infrastructure that have been designed as per established green and sustainable design practices.
- b. Provide a list of all Green Building certifications/accreditations held by Respondent's team members- e.g. LEED Accredited professionals or specialized trainings and certifications.

## **B. Understanding of the Project and Proposed Management Plan (35 Points)**

Respondent must describe its understanding of the Project and specific issues and challenges Respondent likely sees must be involved, as well as the availability of labor resources (Respondent's capacity to perform) in executing the scope of work required. Respondent must submit information in a brief narrative plan clearly and concisely describing the challenges it foresees and its approach to managing the Project.

### **1. Project Understanding (Indexed and Labeled as "Tab 9")**

Respondent shall limit its response to the following items to one (1) page:

- a. Describe Respondent's understanding of the primary objectives of the Project.
- b. Describe the constraints and technical challenges related to construction Respondent foresees and Respondent's approach to addressing each.

### **2. Proposed Management Plan (Indexed and Labeled as "Tab 10")**

Respondent shall limit its response to the following items to a total of two (2) pages:

- a. Describe Respondent's project management approach and team organization, for the provision of the services outlined in this solicitation.
- b. Describe Respondent's Quality Control/Quality Assurance process, approach and capabilities to maintain quality control of all documents and construction.

- c. Describe Respondent’s approach to managing the quality of Sub-consultants.
- d. Describe Respondent’s ability to coordinate work with all Project stakeholders.
- e. Describe Respondent’s approach to assuring timely completion of construction, including methods for schedule recovery, if necessary.
- f. The City has implemented Ready to Work which is an education and job placement program. Respondents can learn more about this initiative at Ready to Work ([www.sanantonio.gov](http://www.sanantonio.gov)) whose goal is to connect residents to career opportunities. Describe how Respondent can leverage this initiative in their training and hiring practices.

**3. Commitment to Green Building and Sustainability Initiatives, Practices and Implementation (Indexed and Labeled as “Tab 11”)**

Respondent must limit its response to the following items to a total of two (2) pages:

- a. Describe Respondent’s commitment to Green and Sustainability initiatives and practices and how these initiatives and practices will be incorporated into this Project.

**C. Experience with the San Antonio Region & Past Performance (10 Points) (Indexed and Labeled as “Tab 12”)**

1. The City is interested in evaluating Respondent’s team (including Sub-consultants(s), if applicable) experience with local processes and practices, as may be evidenced by work in San Antonio and/or the surrounding area, during the past five (5) years. In narrative form, using a maximum of two (2) pages for Respondent’s response and one (1) page for Subcontractor(s) response, if applicable, briefly describe Respondent’s team experience in the areas listed below, referencing projects relating to that experience. (Note: Respondent may reference projects included in the project sheets under Criteria A above, but no additional project sheets shall be provided for this criterion, as the response shall be in narrative form.)

- a. Building envelope (siding, soffit, fascia, roof penetrations, skirting)
- b. Structural systems (foundation, stabilization, reinforcement of structural elements, masonry)
- c. Non-compliance with property maintenance code issues
- d. Weatherization & comfort (wood window repair, windows screens, door repair, insulation)
- e. Longevity (scraping, caulking, painting, flashing, gutter repair)
- f. Safety (porch repair & decking, accessibility)

2. More than one (1) project may be referenced per page, and projects should be discussed in reverse chronological order. (Note: Respondent may reference projects by project name included in the project sheets under Criteria A above or include other projects, but no additional project sheets shall be provided for this criterion, as the response shall be in narrative form.) If Respondent is referencing a project that is not included in the project sheet section, please include the following information:

- a. Project name and description of scope.
- b. Respondent’s project role and work performed.
- c. Names of Respondent’s team members who worked on the project, if applicable.
- d. The contact information of the project’s owner or representative (if different) including name, email, and phone number.

Note a portion of the scoring for this **Section C** may be based on City’s Consultants’ Scorecard, experience with City projects and/or other documentation generated by City staff and previous City Consultants on other City projects. City shall consider the history of Respondent in complying with project programs, schedules and budgets on previous City projects. No items shall be submitted by Respondent for this criterion. Respondent shall not be penalized if it has not done work on City of San Antonio projects. Specific items used for consideration may include, but are not limited to:

- a. Timely completion of City projects.
- b. Cooperative working relationship with City.
- c. Prompt payment of Sub-consultants at all levels.
- d. Compliance with other City contract terms.



- e. Compliance with City Ordinances on substitution/addition/deletion of Sub-consultants.
- f. Compliance with City standards.
- g. Conformance to City budget requirements.

3. Reference checks may be performed with Owners indicated on the submitted project sheets as Tab (“5”).

**D. Small Business Economic Development Advocacy (SBEDA) – (10 Points)**

**SBE Prime Contract Program – 5 pts.**

Certified SBE firms (see Small Business Enterprise definition) headquartered or having a Significant Business Presence within the San Antonio Metropolitan Statistical Area responding to this solicitation as Prime Contractors proposing at least 51% SBE participation (Prime and/or Subcontractor) will receive five (5) evaluation criteria points, and

**M/WBE Prime Contract Program – 5 pts.**

Certified M/WBE firms (see Minority/Women Business Enterprise definition) headquartered or having a Significant Business Presence within the San Antonio Metropolitan Statistical Area responding to this solicitation as Prime Contractors proposing at least 51% M/WBE participation (Prime and/or Subcontractor) will receive five (5) evaluation criteria points.

Each proposal shall be analyzed, to determine overall responsiveness, and consideration shall be given to a combination of price and other factors, such that City may determine which Respondents’ proposal will provide the best value to City. If City elects to conduct interviews of one or more Respondents, in connection with this solicitation, Respondent(s) shall be notified in writing and an interview date shall be scheduled.

**Below is the Evaluation Criteria Summary:**

<b>Evaluation Criteria Summary</b>	<b>Maximum Points</b>
<b>A. Experience, Background, Qualifications of Respondent, Key Personnel, and Key Sub-Consultants</b>	<b>45</b>
<b>B. Understanding of the Project and Proposed Management Plan</b>	<b>35</b>
<b>C. Experience with the San Antonio Region &amp; Past Performance</b>	<b>10</b>
<b>D. Small Business Economic Development Advocacy Program (SBEDA)</b> SBE Prime Contract Program: 5 Points M/WBE Prime Contract Program: 5 Points	<b>10</b>
<b>Total Maximum</b>	<b>100 Points</b>

**Required Forms (to be uploaded individually in CivCast):**

**City shall conduct due diligence and analysis of the following required forms:**

1. **SUBMITTAL COVER/SIGNATURE SHEET (Form #2)** – Respondent shall include the completed Submittal Cover/Signature Sheet with the other required forms. The Submittal Cover/Signature Sheet shall be signed by a person (or persons) authorized to bind Respondent and the entity/entities submitting the response. Signature pages signed by a person other than an officer of the company or partner of the firm shall be accompanied by evidence of authority. Joint ventures submittals require signatures from all firms participating in the joint venture. Submitting joint ventures are required to provide legal proof of the joint venture, such as a joint venture agreement. Respondent is required to enter the Texas Secretary of State Filing Number, Tax ID Number, and the System of Award Management (SAMS) Unique Entity ID.
2. **CONTRACTS DISCLOSURE FORM (Form #3)** – Respondent shall complete the form online at: <https://webapp1.sanantonio.gov/ContractsDisclosure/>, print a copy of the completed form and include in the

packet of required forms. If Respondent is proposing as a team or joint venture, each party to that team or joint venture shall complete and submit a separate Contracts Disclosure Form.

3. **LITIGATION DISCLOSURE FORM (Form #4)** – Respondent shall complete a Litigation Disclosure Form, utilizing additional pages for explanation, if necessary, and submit the completed form. If Respondent is proposing as a team or joint venture, each party to that team or joint venture shall complete and submit a separate Litigation Disclosure Form.
4. **SMALL BUSINESS ECONOMIC DEVELOPMENT SUBCONTRACTOR/SUPPLIER UTILIZATION COMMITMENT FORM (Form #5)** – Respondent shall submit a completed and signed Subcontractor/Supplier Utilization Plan Indicating Respondent’s firm.
5. **LOCAL PREFERENCE PROGRAM (LPP) ORDINANCE IDENTIFICATION (Form#6)** – Respondent must submit a completed and signed LPP Tracking form with this solicitation. The City of San Antonio Local Preference Program, described in the San Antonio City Code Chapter 2, Article XII, establishes a local preference for specific contracting categories. Each time a bidder or respondent submits a bid for a solicitation, this Local Preference Program Identification Form must be completed and turned in with the solicitation response in order to be identified as a City Business and receive the preference described below. The City will not rely on Local Preference Program Identification Forms submitted with prior or contemporaneous bids or proposals.
6. **VETERAN-OWNED SMALL BUSINESS (VOSB) TRACKING FORM (Form #7)** – Respondent must submit a completed and signed VOSB Tracking form with this solicitation. This solicitation is not eligible for a preference based on status as a veteran-owned small business (VOSB). Nevertheless, in order to determine whether the program can be expanded at a later date, the City tracks VOSB participation at both prime contract and subcontract levels. San Antonio City Code Chapter 2, Article XI describes the City’s veteran-owned small business preference program.
7. **PROOF OF INSURABILITY** – Respondent shall submit a copy of its current insurance certificate.
8. **CERTIFICATE OF INTERESTED PARTIES TEC FORM 1295** – The Texas Government Code §2252.908, and the rules issued by the Texas Ethics Commission found in Title 1, Chapter 46 of the Texas Administrative Code, require a business entity to submit a completed Form 1295 to the City before the City may enter into a contract with that business entity:

Form 1295 must be completed online. It is available from the Texas Ethics Commission by accessing the following web address: [https://www.ethics.state.tx.us/whatsnew/elf\\_info\\_form1295.htm](https://www.ethics.state.tx.us/whatsnew/elf_info_form1295.htm).

**Print your completed Form 1295. Submit your signed Form 1295 with your response to this solicitation. Where requested to provide the name of the public entity with whom you are contracting, insert “City of San Antonio”. Where requested to provide the contract number, provide the solicitation number shown on the cover page of this solicitation (e.g. IFB 6100001234, RFO 6100001234 or RFCSP 6100001234).**

The following definitions found in the statute and Texas Ethics Commission rules may be helpful in completing Form 1295.

“Business entity” includes an entity through which business is conducted with a governmental entity or state agency, regardless of whether the entity is a for-profit or nonprofit entity. The term does not include a governmental entity or state agency. (NOTE: The City of San Antonio should never be listed as the “Business entity”.)

“Controlling interest” means: (1) an ownership interest or participating interest in a business entity by virtue of units, percentage, shares, stock, or otherwise that exceeds 10 percent; (2) membership on the board of directors or other governing body of a business entity of which the board or other governing body is composed of not more than 10 members; or (3) service as an officer of a business entity that has four or fewer officers, or service as one of the four officers most highly compensated by a business entity that has more than four officers. Subsection (3) of this section does not apply to an officer of a publicly held business entity or its wholly owned subsidiaries.

“Interested party” means: (1) a person who has a controlling interest in a business entity with whom a governmental entity or state agency contracts; or (2) an intermediary.

“Intermediary,” for purposes of this rule, means a person who actively participates in the facilitation of the contract or negotiating the contract, including a broker, adviser, attorney, or representative of or agent for the business entity who:

- (1) receives compensation from the business entity for the person’s participation;
- (2) communicates directly with the governmental entity or state agency on behalf of the business entity regarding the contract; and
- (3) is not an employee of the business entity or of an entity with a controlling interest in the business entity.

Publicly traded business entities, including their wholly owned subsidiaries, are exempt from this requirement and are not required to submit Form 1295.

City shall review Form 1295 as part of the Minimum Requirements Review performed upon all proposals received. Deficiencies in or missing Form 1295 shall not be a disqualifying error. Instead, City shall notify a Respondent of any requirements to cure the deficiency and/or to submit/re-submit Form 1295 within two (2) days of notice to remain eligible to be considered for a contract award. If applicable, City shall include the selected Respondent’s Form 1295 in its package prepared for the San Antonio City Council’s consideration for contract award.

## VI. SUBMISSION INSTRUCTIONS

Online submission will be via CivCast at <https://www.civcastusa.com/bids>. Online submission services will open for submitting Statement of Qualifications on **February 21, 2024**, and close on **March 22, 2024, at 10:00 a.m. CT**. Follow submittal instructions on <https://www.civcastusa.com/>. **Hard copies of submittal sent by facsimile or email will not be accepted.**

Please adhere to the following criteria:

- Pages equal front only
- No smaller than 11-point font.
- Be succinct and clear.
- Keep your submittal relevant to the target project.
- Each submittal shall include the sections and attachments in the sequence listed in the **Section V**, Submittal Document Requirements & Evaluation Criteria, with each section divided by tabs and indexed, as indicated in this RFQ.
- All pages shall be numbered, and all sections shall adhere to page limits. If a section does not have a page limit specified, there are no page limits for that section.

To correctly submit a response to this RFQ, Respondent shall reveal, disclose and state the true and correct name of the individual, proprietorship, corporation and/or partnership (clearly identifying the responsible general partner and all other partners who would be associated with the contract, if any) submitting the response. The true and correct name 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. Corporate Respondents and limited liability company Respondents shall include the 11-digit Comptroller's Taxpayer Number on the signature page of the Proposal.

Respondent must comply with the Restrictions on Communication section of this RFQ and shall not provide full or partial copies of its submission to City officials or City employees, as defined by that section. Failure to submit a submittal in accordance with the prescribed process will result in Respondent’s submittal being disqualified from consideration.

## VII. AMENDMENTS TO RFQ

Changes, amendments or written responses to questions received in compliance with **Section VIII**, Restrictions on Communication herein, will be posted on the CivCast website at <https://www.civcastusa.com/bids>. It is Respondent's responsibility to review this site and ascertain whether any amendments have been made prior to submission of its proposal. If Respondent does not have access to the Internet, Respondent shall notify City, in accordance with **Section VIII**, Restrictions on Communication, that it wishes to receive copies of changes, amendments or written responses to questions by mail or facsimile.

No oral statement of any person shall modify or otherwise change or affect the terms, conditions or specifications stated in this RFQ and all changes to this RFQ – if any – shall be made by City only in writing.

## VIII. RESTRICTION ON COMMUNICATIONS

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 RFQ or proposal from the time the RFQ 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 RFQ has been released until the contract is approved at a City Council "A" session.

Restrictions extend to "thank you" letters, phone calls, emails and any contact that results in the direct or indirect discussion of the RFQ and/or proposal submitted by Respondent.

Violation of this provision by Respondent and/or its agent may lead to disqualification of Respondent's proposal from consideration.

As used herein, City Official is defined as the Mayor; members of City Council; Municipal Court Judges and Magistrates; City Manager; Deputy City Manager; City Clerk; Deputy City Clerk; Assistant City Clerk; Assistant City Managers; Assistants to City Manager; all City department heads and assistant department heads; Internal Auditor and Assistant Internal Auditors; Compliance Auditor; Assistant to City Council; Assistants to City Council, including contract personnel; Assistant to Mayor; Assistants to the Mayor, including contract personnel; Executive Secretaries; Public Utilities Supervisor; members of bid committees; members of the Historic and Design Review Commission; Zoning Commission; and members of any board or commission that is more than advisory in nature.

Exceptions to the restrictions on communication with City employees include:

1. Respondent may ask verbal questions concerning this RFQ at the Project's Pre-Submittal Conference.
2. Respondent may ask verbal questions concerning this RFCSP at the Project's Site-Visit Meeting if one is scheduled.
3. Respondent must submit questions concerning this RFQ through the CivCast website at <https://www.civcastusa.com/bids> until **March 6, 2024, at 4:00 p.m. CT**. Questions received after the stated deadline shall not be answered.
4. Respondents and/or their agents are encouraged to contact the Small Business Office of the Economic Development Department for assistance or clarification with issues specifically related to the City's Small Business Economic Development Advocacy (SBEDA) Program policy and/or completion of the required SBEDA forms. The point of contact may be reached by telephone at (210) 207-3932 or by e-mail at [SBEDAdocs@sanantonio.gov](mailto:SBEDAdocs@sanantonio.gov). After the solicitation closing date, there is no contact permitted to the Small Business Office regarding this solicitation.
5. Respondent must provide responses to any questions asked of it by City's Staff Contact Person and/or his/her designee about City's SBEDA Program both before and after responses are received and opened. During interviews, if any, verbal questions and explanations will be permitted. If Respondent is invited for an interview and/or demonstration, the City requests Respondents limit the size of their team to no more than four (4) people of Respondent's choosing and subject to City's approval. Attorneys and/or lobbyists are strictly prohibited from attendance. If you are utilizing a subcontractor, a subcontractor representative should be included. The City reserves the right to exclude any persons from interviews as it deems in its best interest.

Upon completion of the evaluation process, Respondents shall receive a notification letter indicating the recommended firm, anticipated City Council agenda date, and a review of the solicitation process.

City reserves the right to contact any Respondent to negotiate if such is deemed desirable by City. Such negotiations, initiated by City staff persons, shall not be considered a violation by Respondent of this section.

## IX. AWARD OF CONTRACT AND RESERVATION OF RIGHTS

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

- A. A Contract, if awarded, shall be awarded to a Respondent whose proposal is deemed most advantageous to City, as determined by the selection committee and upon the approval by the San Antonio City Council.
- B. City may accept any proposal in whole or in part. If subsequent contract negotiations are conducted, such negotiations shall not constitute a rejection or alternate RFQ on the part of City. However, final selection of a Respondent is subject to San Antonio City Council approval.
- C. City reserves the right to accept one or more proposals or reject any or all proposals received in response to this RFQ and to waive informalities and irregularities in any proposal received. City also reserves the right to terminate this RFQ, reissue a subsequent solicitation and/or remedy technical errors in the RFQ process.
- D. By executing the Submittal Cover/Signature Sheet, Respondent agrees to be bound by the terms therein. Respondent acknowledges it has received all Addenda and agrees to be bound by the terms, conditions and requirements of this submitted submittal, all documents listed in the RFQ Submittal Checklist and Table of Contents, the enabling City Ordinance and all of the associated documentation that form the entire Contract to which Respondent shall be bound, upon the approval of the San Antonio City Council. All Contract documents are not binding on City until approved by the San Antonio City Attorney's office and the San Antonio City Council. No work shall commence on the subject Project until Respondent provides the necessary evidence of insurance required in City's General Conditions for City of San Antonio Construction Contracts and until City signs the Notice to Proceed. In the event the parties cannot negotiate within the time specified by City, City reserves the right to terminate negotiations with the selected Respondent and commence negotiations with another Respondent.
- E. This RFQ does not commit City to enter to an agreement or award any services related to this RFQ, nor does it obligate City to pay any costs incurred by Respondent in the preparation or submission of a response or in anticipation of a contract.
- F. City administers its design and construction management through an Internet-based management system. All vendors shall be required to use City's system and submit Project schedules as City dictates.
- G. **Conflicts of Interest:** Respondent acknowledges that it is informed that the Charter of City of San Antonio and its Ethics Code prohibit a City officer or employee, as those terms are defined in the Ethics Code, from having a financial interest in any contract entered into with City or any City agency, such as City-owned utilities. An officer or employee has a "prohibited financial interest" in a contract with City or in the sale to City of land, materials, supplies or service, if any of the following individual(s) or entities is a party to the contract or sale: City officer or employee; his/her parent, child or spouse; a business entity in which he/she or his/her parent, child or spouse owns ten percent (10%) or more of the voting stock or shares of the business entity, or ten percent (10%) or more of the fair market value of the business entity; or a business entity in which any individual or entity listed by Respondent is a Subcontractor on a City contract, a partner or a parent or subsidiary business entity.
- H. Respondent is required to warrant and certify that it, its officers, employees and agents are neither officials nor employees of City, as defined in Section 2-42 of City's Ethics Code. (Contracts Disclosure Form) – Instructions and web-link to electronic form are included in **Form 3** of RFQ.
- I. **Independent Contractor:** Respondent understands, accepts and agrees, if selected, it and all persons designated by it to provide services in connection with a contract, is/are and shall be deemed to be an Independent Contractor(s), responsible for its/their respective acts or omissions, that City shall in no way be responsible for Respondent's actions and that none of the parties to this award shall have authority to bind the other or to hold out to third parties that it has such authority.
- J. **State of Texas Conflict of Interest Questionnaire (Form CIQ).** 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 City shall file a Form CIQ with the City Clerk if those persons meet the requirements under §176.006(a) of the statute.

By law this questionnaire must be filed with the City Clerk not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. See Section 176.006(a-1), Texas Local Government Code.

Form CIQ is available from the Texas Ethics Commission by accessing the following web address:  
<https://www.ethics.state.tx.us/forms/conflict/>

In addition, please complete the City's Addendum to Form CIQ (Form CIQ-A) and submit it with Form CIQ to the Office of the City Clerk. The Form CIQ-A can be found at:  
<http://www.sanantonio.gov/atty/ethics/pdf/OCC-CIQ-Addendum.pdf>

When completed, the CIQ Form and the CIQ-A Form should be submitted together by mail to the Office of the City Clerk. Please mail to:

**Office of the City Clerk,  
P.O. Box 839966,  
San Antonio, TX 78283-3966**

Do not include these forms with your sealed bid. The procurement staff will not deliver the forms to the City Clerk for you. Respondent shall consult its own legal advisor if it has any questions regarding the statute, Form CIQ or CIQ Addendum.

- K. All submittals become the property of City upon receipt and shall not be returned. Any information deemed to be confidential by Respondent clearly should be noted on the page(s) where confidential information is contained; however, City cannot guarantee that it shall 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.
- L. Any cost or expense incurred by the Respondent associated with the preparation of its submittal, the Pre-Submittal Conference or during any phase of the selection process, if any, shall be borne solely by Respondent.
- M. City reserves the right to verify any and all information submitted by Respondents at any time during the solicitation/evaluation process.
- N. Final approval of a selected firm(s) is subject to the action of the San Antonio City Council.
- O. City reserves the right to contact any Respondent to negotiate a contract, if such action is deemed desirable by City.

**P. TEXAS GOVERNMENT CODE §2270.002:**

State Prohibitions on Contracts:

This section only applies to a contract that:

- (1) is between a governmental entity and a company with 10 or more full-time employees; and
- (2) has a value of \$100,000 or more that is to be paid wholly or partly from public funds of the governmental entity.

"Company" means a for-profit organization, association, corporation, partnership, joint venture, limited partnership, limited liability partnership, or limited liability company, including a wholly

owned subsidiary, majority-owned subsidiary, parent company, or affiliate of those entities or business associations that exists to make a profit. This term does not include a sole proprietorship.

Prohibition on Contracts with Companies Boycotting Israel.

Texas Government Code §2271.002 provides that a governmental entity may not enter into a contract with a company for goods or services, unless the contract contains a written verification from the company that it: (1) does not boycott Israel; and (2) will not boycott Israel during the term of the contract.

"Boycott Israel" means refusing to deal with, terminating business activities with, or otherwise taking any action that is intended to penalize, inflict economic harm on, or limit commercial relations specifically with Israel, or with a person or entity doing business in Israel or in an Israeli-controlled territory, but does not include an action made for ordinary business purposes.

By submitting an offer to or executing contract documents with the City of San Antonio, Company hereby verifies that it does not boycott Israel, and will not boycott Israel during the term of the contract. City hereby relies on Company's verification. If found to be false, City may terminate the contract for material breach.

**Prohibition on Contracts with Companies Boycotting Certain Energy Companies.**

Texas Government Code §2274 provides that a governmental entity may not enter into a contract with a company for goods or services, unless the contract contains a written verification from the company that it: (1) does not boycott energy companies; and (2) will not boycott energy companies during the term of the contract.

"Boycott energy company" means, without an ordinary business purpose, refusing to deal with, terminating business activities with, or otherwise taking any action that is intended to penalize, inflict economic harm on, or limit commercial relations with a company because the company: (A) engages in the exploration, production, utilization, transportation, sale, or manufacturing of fossil fuel-based energy and does not commit or pledge to meet environmental standards beyond applicable federal and state law; or (B) does business with a company described in (A).

By submitting an offer to or executing contract documents with the City of San Antonio, Company hereby verifies that it does not boycott energy companies and will not boycott energy companies during the term of the contract. City hereby relies on Company's verification. If found to be false, City may terminate the contract for material breach.

**Prohibition on Contracts with Companies that Discriminate Against Firearm and Ammunition Industries.**

Texas Government Code §2274 provides that a governmental entity may not enter into a contract with a company for goods or services, unless the contract contains a written verification from the company that it: (1) does not have a practice, policy, guidance, or directive that discriminates against a firearm entity or firearm trade association; and (2) will not discriminate during the term of the contract against a firearm entity or firearm trade association.

"Discriminate against a firearm entity or firearm trade association": (A) means, with respect to the entity or association, to: (i) refuse to engage in the trade of any goods or services with the entity or association based solely on its status as a firearm entity or firearm trade association; (ii) refrain from continuing an existing business relationship with the entity or association based solely on its status as a firearm entity or firearm trade association; or (iii) terminate an existing business relationship with the entity or association based solely on its status as a firearm entity or firearm trade association.

By submitting an offer to or executing contract documents with the City of San Antonio, Company hereby verifies that it does not have a practice, policy, guidance, or directive that discriminates against a firearm entity or firearm trade association; and will not discriminate during the term of the contract against a firearm entity or firearm trade association. City hereby relies on Company's verification. If found to be false, City may terminate the contract for material breach.

**Q. Texas Government Code § 2252.152:**

Contracts with companies engaged in business with Iran, Sudan, or foreign terrorist organization prohibited.

**Texas Government Code §2252.152** provides that a governmental entity may not enter into a governmental contract with a company that is identified on a list prepared and maintained under Texas Government Code §2270.0201 or §2252.153 "Listed Companies". Consultant/Contractor hereby certifies that it is not identified on such a list and that it will notify City should it be placed on such a list while under contract with City. City hereby relies on Consultant's/Contractor's certification. If found to be false, or if Consultant/Contractor is identified on such list during the course of its contract with City, City may terminate this Agreement for material breach.

**R. S.B. 943 – Disclosure Requirements for Certain Government Contracts.**

S.B. 943 – Disclosure Requirements for Certain Government Contracts. For contracts (1) with a stated expenditure of at least \$1 million in public funds for the purchase of goods or services by the City, or (2) that result in the expenditure of at least \$1 million in public funds for the purchase of goods or services by the City in a given fiscal year, Respondent acknowledges that the requirements of the Texas Public Information Act, Government Code, Chapter 552, Subchapter J, pertaining to the preservation and disclosure of Contracting Information maintained by the City or sent between the City and a vendor, contractor, potential vendor, or potential contractor, may apply to this RFQ and any resulting contract. Respondent agrees that the contract can be terminated if Respondent knowingly or intentionally fails to comply with a requirement of that subchapter.

By submitting a proposal, Respondent warrants and certifies, and a contract awarded pursuant to this RFQ is made in reliance thereon, that it, has not knowingly or intentionally failed to comply with this subchapter in a previous RFQ or contract. City hereby relies on Respondent's certification, and if found to be false, City may reject the proposal or terminate the Contract for material breach.