



## City of San Antonio

**SUBJECT:** Request for Proposals (RFP) for Investment Consulting and Investment Training Services, (RFP 016-070), Proposals Due: **July 20, 2016**; Date of Issue: **June 20, 2016**

**FROM:** Denise D. Gallegos, C.P.M., CPPB  
Procurement Administrator

**DATE:** July 6, 2016

**THIS NOTICE SHALL SERVE AS ADDENDUM NO. 4 - TO THE ABOVE REFERENCED  
REQUEST FOR PROPOSALS**

**QUESTIONS SUBMITTED IN ACCORDANCE WITH SECTION 010, RESTRICTIONS ON  
COMMUNICATION:**

The following are questions submitted for the subject RFP received prior to 2:00 PM CST Tuesday, July 5, 2016. The City's official response to questions asked is as follows:

Question 1: Should all copies of the submission be in a binder?

Response: The responses (original and copies) to the subject RFP should be bound individually.

Question 2: Are the Tabs for the responses to be included in the seven (7) copies only or in the original as well?

Response: The tabs should be included in the original document and the seven (7) copies.

Question 3: Are the Tabs only for the following: General Information Form; Experience, Background, Qualifications; Proposed Plan; Contracts Disclosure Form; Small Business Economic Development Advocacy Program Forms; Local Preference Ordinance Form; Veteran Owned Small Business Preference Program Form or all sections on page 6 & 7 of the RFP?

Response: The original response will include tabs for General Information Form; Experience, Background, Qualifications; Proposed Plan; Contracts Disclosure Form; Litigation Disclosure Form; Price Schedule; Small Business Economic Development Advocacy Program forms; Local Preference Ordinance Form; Veteran Owned Small Business Preference Program form. The seven (7) copies of the responses should include only tabs for General Information Form; Experience, Background, Qualifications; Proposed Plan; Contracts Disclosure Form; Litigation Disclosure Form. The following documents and sections **should not** be included in your seven (7) copies: Price Schedule, Small Business Economic Development Advocacy Program Forms; Local Preference Ordinance Form; Veteran Owned Small Business Preference Program Form.

Question 4: Is the Certified Vendor Registration Form posted on the City's website?

Response: The Certified Vendor Registration form can be found on the City's website at [www.sanantonio.gov](http://www.sanantonio.gov)

Question 5: Do the following forms need to be submitted prior to the proposal?

- State of Texas Conflict of Interest Questionnaire Form (Form CIQ)
- City's Addendum to Form CIQ (Form CIQ-A)

Response: The questionnaire must be filed with the Office of the City Clerk no later than the 7<sup>th</sup> business day after the date the vendor becomes aware of facts that require the statement to be filed. Please review requirements in section 013 – AWARD OF CONTRACT AND RESERVATION OF RIGHTS.

Question 6: Section 010 – The Submission of Proposal states that all hard copies must be stapled. Is it ok to bind the materials?

Response: Proposals submitted can be stapled or bound using binder clips or binders.

Question 7: Regarding the 10 page limit for Attachment A – does this include parts one, two, and three?

Response: There is a 10 page limit for RFP Attachment A, which includes parts one and two.

Question 8: As a private company, it is our policy to not disclose our firm's financial statements. Will this render us nonresponsive?

Response: Audited financial statements are requested. In the event audited financial statements are not available, state the reason why (in your proposal). If audited financials are not available, Respondents may submit other financial statement(s) or documentation, such as a Trial Balance Income Statement along with the most recent Annual Tax Submission that validates and ensures the long term financial viability of the organization. Failure to provide requested information may impact your firm's final score.



Denise D. Gallegos, C.P.M., CPPB  
Procurement Administrator  
Finance Department–Purchasing Division