

City of San Antonio  
Economic Development Department  
and the  
World Heritage Office



in partnership with the  
Southside First Economic Development Council

REQUEST FOR PROPOSAL (“RFP”)  
for  
SOUTHSIDE SAN ANTONIO  
OPPORTUNITY ZONES  
STRATEGIC PLAN

**Release Date: Thursday, July 23, 2020**

**Proposal Due Date: Monday, August 24 at 5:00pm CST**

Responses received after this time shall not be considered and will not be opened.

## I. BACKGROUND

The City of San Antonio (**City**) Economic Development Department (**EDD**), World Heritage Office (**WHO**) and the Southside First (**SSF**) Economic Development Council are presenting this Request for Proposal (**RFP**) for a Southside San Antonio Opportunity Zones Strategic Plan (**Strategic Plan**). The purpose of this strategic plan is to encourage and attract investment for the southside opportunity zones, a historically low-income area. Investments must be in alignment with community priorities and sensitive to the existing residents and small business community. Respondents must demonstrate expertise in the following areas:

- Real estate investment;
- Economic development;
- Infrastructure and planning; and
- Community outreach (in Spanish and in English).

Respondents must engage with community stakeholders to determine community interests, concerns, and expectations related to growth and development. Community stakeholders include local leaders, area residents, as well as business and property owners. The resulting strategic plan will be managed and implemented by SSF staff, and should recommend viable investment opportunities including, but not limited to:

- Housing development;
- Real estate development;
- Local retail development; and
- Businesses seeking investment.

### ***Covid-19***

Coronavirus (COVID-19) is an illness caused by a virus that can spread from person to person. The virus that causes COVID-19 is a new coronavirus that has spread throughout the world. COVID-19 symptoms can range from mild (or no symptoms) to severe illness. The City of San Antonio and Bexar County have issued several stay-home orders in response to the pandemic that have included limitations in gatherings, wearing face coverings and closures of non-essential business.

Mayor Ron Nirenberg issued a sixth addendum to his Eighth Emergency Health Declaration on July 17, 2020 that took effect immediately. The order requires that all commercial businesses in San Antonio and Bexar County, must as part of previously required Health and Safety Policies, prominently display a list of COVID-19 symptoms at or near public and employee entrances. The order provides guidance for the use of face coverings, social distancing and large gatherings are prohibited. This information is continually evolving as the City responds to the pandemic. Respondent should be informed and provide recommendation in alignment with current policies. Respondents may visit <https://covid19.sanantonio.gov/About-COVID-19/Declarations-Orders> to stay up to date on City Council Covid-19 declarations and orders. Additionally, Governor Abbott issued two new statewide executive orders effective July 3, 2020 requiring masks and a proclamation that prohibits gatherings of more than ten people.

San Antonio and Bexar County has effectively managed the impacts of Covid-19 due to implementation of safety measures. The continued management of the Covid-19 virus will require avoidance of mass gatherings and effective social distancing of at least six feet. RFP Respondents

should be knowledgeable of the current pandemic safety measures and propose engagement strategies in alignment with safety measures.

### ***Southside First***

Southside First Economic Development Council is an initiative launched by the South San Antonio Chamber of Commerce Foundation to be the voice of economic prosperity, community bridging and responsible development for the Southside (South San Antonio/Bexar County).

Established goals for Southside First include:

1. Encourage and Promote Investment.
2. Energize and Empower Businesses and Residents.
3. Support Revitalization Efforts for Southside Business Corridors and Neighborhoods.

### ***Southside First Community Surveys***

In 2019, Southside First Economic Development Council (SSF) in partnership with St. Mary's University conducted an in-person, door-to door survey of the Mission San Jose and Quintana neighborhoods with community residents and business owners to learn more about their business and economic needs. The Quintana neighborhood survey was conducted from June – August, and the Mission San Jose neighborhood survey was conducted from July – August, with a total of 124 participants and 109 participants, respectively. The survey report for each neighborhood is included as **Attachment A** and **Attachment B** in this RFP. A portion of the opportunity zones included in the RFP encompass the neighborhoods surveyed and it is important for Respondent to be familiar with survey findings as community engagement is significant in this RFP.

### ***Partnership with Local Universities***

The community engagement component of this RFP provides partnership opportunities for area universities. The Respondent will partner with local universities to engage graduate students in the RFP process. The Economic Development Department and World Heritage Office will assist the Respondent in identifying local universities with graduate programs interested in assisting. The programs will include a diverse representation of disciplines from graduate programs (not limited to) in planning, economic development and public administration. Utilization of local graduate students will provide a unique learning opportunity and help increase local capacity.

### ***Opportunity Zones***

Established by the *Tax Cuts & Jobs Act of 2017*, Opportunity Zones provide a tax incentive as an economic development tool to encourage long-term investment in distressed communities. The tax incentive encourages investment of unrealized capital gains in designated opportunity zones in exchange for deferral and reduction of capital gains taxes, and exclusion of appreciation of any invested capital gains. Opportunity Zones investments must be made through the creation of a Qualified Opportunity Fund (QOF); the investment vehicle that enables capital to be deployed to projects in designated opportunity zones. Eligible investments include stock of a qualified corporation, interest in a qualified partnership, or property in designated OZs.

The U.S. Internal Revenue Service released the final set of regulation on January 13, 2020 and they were finalized in March 2020. Respondents are responsible for researching the most up-to-date information regarding utilization of the tax incentive to understand its applicability with a myriad of projects.

## II. SCOPE OF SERVICES

This RFP and Strategic Plan will focus on four specific southside census tracts: 1609.02, 9800.02; 922; and 1508. Maps of the affected opportunity zones is included as **Attachment C**. These opportunity zones encompass historical locations such as Stinson Airport, a portion of the UNESCO designated San Antonio Missions, Brooks and neighbor Port San Antonio. Respondents should be knowledgeable of community stakeholders and recent efforts such as the World Heritage Office landuse amendments and large area rezoning, 2017 bond projects and any SA Tomorrow regional and community plans to best inform strategic plan recommendations.

To achieve the goals of the Strategic Plan, Respondents should outline strategies specific to the Opportunity Zones based on real estate investment and development, master planning, economic analysis, and community engagement. The Strategic Plan must accomplish the following:

- Identify businesses and commercial corridors within the census tracts in need of investment;
- Identify property, projects, and businesses in opportunity zones that are viable investment opportunities;
- Identify community redevelopment priorities through research and community outreach;
- Identify infrastructure improvements that can attract or encourage development. Analysis should include cost estimates and ranked in priority to success of growth and development within Southside Opportunity Zones;
- Analyze immediate and future development patterns that enhance investment strategies;
- Incorporate existing community, historic and culturally relevant infrastructure, spaces, and preservation strategies;
- Recommend business or real estate development incentives that can further attract investment or community development partnerships that align with identified community redevelopment priorities;
- Detail how these investments and strategies will enhance the existing community, while mitigating displacement and negative effects of gentrification.

Additional considerations include the following:

### ***Assessment of Southside Opportunity Zones***

1. Research best practices for community investment and incorporate as appropriate. Information should be considerate of affected historic districts and near a World Heritage site.
2. Conduct engagement with stakeholders, the general public and relevant boards or commissions to discuss, develop and present strategies, concepts, and programs and incorporate feedback and recommendations as needed. Community engagement materials and any available materials must be produced in Spanish and English. Identify residential, business and area organizations' interests, concerns and expectations related to community growth and development; include potential for project partnerships and community enhancement.
3. Examine viable opportunities for real estate development within the southside opportunity zones by compiling an inventory of existing parcels, sectors and/or corridors listing vacant

land, unoccupied structures, residential units, businesses, non-profits, and publicly owned parcels with corresponding zoning designations.

4. Identify businesses, landowners and/or new types of business opportunities; specifically, locally based businesses to include hospitality appropriate within a World Heritage area for collaborative project investments or partnerships that are sensitive to the desires of the neighborhoods.

### ***Strategy Development***

5. Identify and assess current commercial corridors and outline how recommended investments may compliment other planning efforts and initiatives underway in the area. Identify infrastructure needs and costs, as well as public incentives that would enhance investment viability. Provide a financial analysis on strategies outlining potential funding opportunities and capitalization strategies to move projects forward including the use of public and private funding options such as future bond projects and TIRZ funds.
6. Identify potential investment partnerships with sectors, owners, etc. adjacent to and inform future development patterns. Incorporate financial incentives and investment pathways.
7. Identify investment challenges and opportunities related to public and non-profit property owner strategies, goals, and plans.
8. Produce implementation strategies that identify potential obstacles related to development and finance.
9. Identify displacement risks for existing residents and businesses that may result from potential investment projects. Recommend strategies for how to overcome this potential negative outcome.

### ***Report Findings***

10. The report should define metrics, identify inputs and outputs, and report projected economic development impact to public and private agencies, businesses and surrounding communities in the opportunity zones and immediate area.
11. Outline short-, medium-, and long-term priorities for the Strategic Plan.

The Strategic Plan should include the above scope in developing the plan while complementing other efforts underway in the area. All work should reflect a master vision for the area that respects cultural and historic relevancy while positively impacting the community.

### **III. TERM OF CONTRACT**

The contract for the Strategic Plan will commence on the date of execution of the fully negotiated agreement and will end on or before December 30, 2020.

### **IV. PROJECT BUDGET**

The estimated budget for the scope of services to be performed is up to \$49,000. Respondents are required to submit a payment schedule, to include partial payment at project start, partial payment at project mid-point, and remainder at project completion.

### **V. PROPOSAL REQUIREMENTS**

Respondent's submission shall include the following information in the sequence as listed below.

**A. Section A : Qualifications, Personnel, Organization**

- i. Provide an executive summary (1 page).
- ii. Describe the organization, date founded, and ownership of your firm as well as any subsidiaries and affiliates (1 page).
- iii. Provide a general statement of qualifications that responds to the project background information given above including the strength of partnerships with community, local government, and/or other third parties (1 page).
- iv. List the professional and support positions and number of personnel in each position (1 page).
- v. Provide an organization chart, including résumés (please limit to 1 page each) of all personnel who would be committed to this project and clearly identify the main point of contact for this project. Provide specific information as to their experience on similar projects. Provide the name and phone number of three clients with whom the Respondent has worked on a similar strategic planning project.
- vi. List professional sub-consultants if applicable. Provide specific information documenting their work on similar projects (no more than 1 page per sub-consultant).

**B. Section B: Background and Experience (Samples of Work)**

- i. Explain your firm's expertise with similar concept development including a list of all similar development projects your firm currently has in progress and the status of each (2 pages).
- ii. For your last three similar strategic planning projects, provide the following (1 page per project):
  - Name of Project
  - Client contact
  - Owner's total initial budget
  - Total project cost
  - Number of change orders
  - Total cost of change orders
  - Date of bid
  - Scheduled completion date
  - Actual completion date
- iii. List your three best projects and the project personnel, including consultants, for those projects (no more than 1 page per project).

**C. Section C Proposal for the Southside Opportunity Zones Strategic Plan**

- i. Provide information on your current workload and how you would accommodate this project.
- ii. Describe in detail the process that you would follow to produce the Strategic Plan. Include

examples of situations from comparable projects where the stakeholders and existing community realized tangible value. Describe community engagement methods cognization of the social distancing and safety measure as a result of Covid-19.

- iii. Outline the schedule that you would implement to meet the timeframe and completion date. Describe the methods you would use to maintain this schedule.
- iv. Describe your method for consensus building, including your role, the methodology employed, the outcome, and a contact person for a recent project where you employed this method.
- v. Describe the types of problems you have encountered on similar projects and explain what you did to resolve the problems and what you would do differently to avoid such problems on future projects.

Respondent is expected to examine this RFP carefully to understand the terms and conditions for providing the services listed herein and to respond completely. FAILURE TO COMPLETE AND PROVIDE ALL DOCUMENTS WILL RESULT IN THE FIRM NOT BEING CONSIDERED FOR ENGAGEMENT.

## **VI. AMENDMENTS TO RFP**

Changes, amendments or written responses to questions received regarding this RFP will be posted on the Southside First website at <https://www.southsidefirst.org/> and on the City's Bidding and Contracting website at <https://www.sanantonio.gov/purchasing/biddingcontract/opportunities>.

It is the Respondent's responsibility to review this site and determine whether any amendments to this RFP have been made prior to submission of a proposal. No oral statement of any person shall modify or otherwise change or affect the terms, conditions or specifications stated in this RFP, and changes to this RFP, if any, shall be made in writing only as described above.

## **VII. SUBMISSION OF PROPOSAL REQUIREMENTS**

1. Responses must be received by **5:00 p.m. CST, Monday, August 24, 2020**. Responses received after this time shall not be considered and will not be opened.

*2. Due to Covid-19, Respondents may submit all responses and bid/proposal submissions electronically by emailing them to [sbedainfo@sanantonio.gov](mailto:sbedainfo@sanantonio.gov) before the posted deadline in an effort to ensure safety measures. The email subject shall be marked "San Antonio Southside Opportunity Zones Strategic Plan." Bid/proposal submissions shall be in PDF format.*

3. Please include section dividers between each section for Sections A-C.

4. Responses received and packaged other than described above will not be reviewed.

NOTE: Ann Eaton, [ann.eaton@sanantonio.gov](mailto:ann.eaton@sanantonio.gov), will send an email acknowledging receipt of all submitted responses to the contact person listed in the proposal.

5. All timely responses become the property of the City of San Antonio Economic Development Department and World Heritage Office upon receipt and will not be returned. The name and the return address of the Respondent must be clearly visible. Any information deemed to be confidential by Respondent should be clearly noted on the page(s) where confidential information is contained; however the City of San Antonio cannot guarantee that it will 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. Respondent will be deemed to have submitted all such information with this understanding.

6. Respondent shall pay any cost or expense incurred in the preparation of the proposal response.

### **VIII. RESTRICTIONS ON COMMUNICATION**

I. Respondent is prohibited from soliciting or lobbying activities with EDD, WHO and SSF employees and board members regarding this RFP from the time it is publicly disseminated to the time the prohibition is lifted by City of San Antonio in writing.

II. All questions concerning this RFP shall be submitted, in writing, to [ann.eaton@sanantonio.gov](mailto:ann.eaton@sanantonio.gov). All questions must be received by **4:00 PM CST on Wednesday, August 19, 2020**. Any questions received after that time will not be addressed.

III. The City of San Antonio reserves the right to contact any Respondent for clarification after responses are received and/or to further negotiate with any Respondent if deemed desirable or necessary.

### **IX. EVALUATION CRITERIA**

Proposals will be evaluated as follows:

- i.** 20% - Qualifications
- ii.** 30% - Background and Experience
- iii.** 50% - Proposal