



**CITY OF SAN ANTONIO
ECONOMIC DEVELOPMENT
DEPARTMENT**

**in partnership with the
Westside Development Corporation**



**WESTSIDE
DEVELOPMENT
CORPORATION**

REQUEST FOR PROPOSAL (“RFP”)

For

**NEAR WEST SAN ANTONIO
OPPORTUNITY ZONE
STRATEGIC PLAN**

Release Date: December 21, 2018

Proposal Due Date: January 25, 2019; 4:00 pm Central Time

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**) and the Westside Development Corporation (**WDC**) are presenting this request for proposal (**RFP**) for a Near West San Antonio Opportunity Zone Strategic Plan (**Strategic Plan**). EDD and WDC encourage firms with knowledge of investment banking, real estate planning, and governmental economic development planning efforts to apply. Respondents must demonstrate expertise in the following areas:

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

The goal of this plan is to attract Opportunity Zone (**OZ**) investment in the West Side of San Antonio, a historically low-income area. Investment must be in alignment with community priorities and be sensitive to the existing community. Respondents should include investment opportunities and strategies relating to the following:

- Development projects seeking investment, including, but not limited to, the following:
 - Housing development; and
 - Real estate development; and
- Businesses seeking investment.

Respondents must include recommendations that ease OZ investment pathways starting in 2019 that will stimulate positive community and economic growth. WDC staff will direct and will oversee all services performed in response to this RFP.

WESTSIDE DEVELOPMENT CORPORATION

The City created the WDC pursuant the provisions of Subchapter D of Chapter 431 of the Texas Transportation Code. The WDC is a non-profit, local government corporation, empowered to accomplish governmental purposes as authorized by Chapter 431 of the Transportation Code and other authorities, including other state statutes, the Constitution of the State of Texas (including but without limitation in Article III, Section 52a), Chapters 373 and 380 of the Local Government Code, Chapters 1433, 1506, 1508 and 1509 of the Texas Government Code, and Chapter 311 of the Tax Code. The WDC is governed by a board of directors, which has control and management supervision of all affairs of the WDC target area. The City Council appoints the WDC board of directors.

The WDC is organized for the purpose of both aiding and acting on behalf of the City to accomplish certain governmental purposes. Specifically:

- To promote economic development and to stimulate business and commercial activity in the WDC target area;
- To diversify the economy of the WDC target area;
- To reduce unemployment or underemployment in the WDC target area;
- To increase the public health, safety, and welfare of persons in the WDC target area; and
- To promote the development and the redevelopment of real estate in the WDC target area that would not otherwise occur through private investments.

OPPORTUNITY ZONES*

Established by Tax Cuts & Jobs Act of 2017, OZs are a new community development tool developed to encourage long-term investment in distressed communities. The program encourages long-term investment of previously unrealized capital gains in designated zones in exchange for deferment and reduction of capital gains taxes. Investments must be made through an Opportunity Fund (O-Fund), the investment vehicle that enables the tax benefits of the program. Eligible O-Fund investments include, stock of a qualified corporation, interest in a qualified partnership, or property in designated OZs.

*Official program information, data, statistics, requirements, etc., may differ from what is provided in this document. The U.S. Internal Revenue Service issued an initial set of proposed regulations on October 19, 2018, and anticipates a second round to be issued in late 2018 or early 2019. Respondents are responsible for researching the most up-to-date information regarding this new program.

II. SCOPE OF SERVICES

This RFP relates to three census tracts (1701.02, 1106 and 1105) that have been designated as OZs (the **Near Westside OZs** as shown in RFP **Attachment 1**). To achieve the goals of the Strategic Plan, Respondents should outline regional strategies and strategies specific to the zones that 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 in need of investment;
- Identify property, projects, and businesses in OZs that are viable investment opportunities;
- Incorporate existing planning efforts in the private and public sectors for potential investment linkages;
- Identify community redevelopment priorities through research and community outreach;
- Identify infrastructure improvements that can attract or encourage development;
- Analyze immediate and future development patterns that enhance investment strategies;
- Incorporate existing community and culturally relevant infrastructure, spaces, and preservation strategies;
- Recommend business or real estate development incentives that can further attract investment in line with identified priorities;
- Recommend land-use controls or changes that may encourage desirable forms of development; and
- 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 Near Westside OZs

1. Research best practices for community investment and incorporate as appropriate.
2. Conduct meetings and presentations 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 meetings must be able to be conducted in Spanish and in English.
3. Work with local, regional, and national entities as needed to gather and to incorporate feedback into the planning process.
4. Compile a synopsis of existing plans that address the area's land use and development needs and indicate their utility and viability as baseline references for investment and strategic planning.
5. Examine viable opportunities for real estate development within the Near Westside OZs 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.

6. Identify businesses, land owners, and/or new types of business opportunities for collaborative project investments or partnerships.
7. Identify residential, business and area organizations' interests, concerns and expectations related to community growth and development; include potential for project partnerships and community enhancement.

Strategy Development

8. Identify and assess current commercial corridors and outline how recommended investments may compliment the other planning efforts and initiatives being undertaken in the area.
9. Identify potential investment linkages with sectors, owners, etc. adjacent to OZs (e.g., Guadalupe Plaza) and inform future development patterns. Incorporate financial incentives and investment pathways.
10. Identify investment challenges and opportunities related to public and non-profit property owner strategies, goals, and plans (e.g., Haven for Hope, Bexar County Adult Detention Center, Child Protective Services, San Antonio Housing Authority, San Antonio Water System, University Health System, Bexar County, City of San Antonio, Avenida Guadalupe, etc.).
11. Describe potential development scenarios consistent with community interests and investment viability that address social needs that stimulate economic growth, based on data analysis, research and public input.
12. Identify infrastructure needs and costs to support development scenarios, 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.
13. Produce implementation strategies that identify potential obstacles related to development and finance.
14. 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

15. Define metrics and outputs, identify inputs and report projected economic development impact to public and private agencies, businesses and surrounding neighborhoods and communities in the OZs and immediate area.
16. 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 being undertaken in the area. All work should reflect a master vision for the area that respects cultural and historic relevancy while positively impacting the community. **The successful Respondent must coordinate with private and public agencies and with entities that may be involved in other initiatives, master plans, development, redevelopment, and/or projects in the area, and will need to incorporate these initiatives into the Strategic Plan.**

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 within six (6) months.

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

- Provide an executive summary (1 page).
- Describe the organization, date founded, and ownership of your firm as well as any subsidiaries and affiliates (1 page).
- 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).
- List the professional and support positions and number of personnel in each position (1 page).
- 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. For the project manager and members identified as part of the project team, provide the name and phone number of three clients with whom the architect has worked on a similar strategic planning project.
- List professional subconsultants if applicable. Provide specific information documenting their work on similar projects (no more than 1 page per subconsultant).

Section B: Background and Experience (Samples of Work)

- 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).
- 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
- List your three best projects and the project personnel, including consultants, for those projects (no more than 1 page per project).

B. Section C: Proposal for the Near West San Antonio Opportunity Zone Strategic Plan

- Provide information on your current workload and how you would accommodate this project.
- Describe in detail the process that you would follow to produce the Strategic Plan.
- Outline the schedule that you would implement to meet the 6-month timeframe and completion date. Describe the methods you would use to maintain this schedule.
- 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.
- 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.
- Explain the process you would go through to develop the strategic plan. Include examples of situations from comparable projects where the stakeholders and existing community realized tangible value.
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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 WDC website at <http://www.WestsideDevCorp.com> and on the City's Bidding and Contracting Opportunities 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

- i. Responses must be received by 4:00 p.m. Central Time, January 25, 2019. Responses received after this time shall not be considered and will not be opened.
- ii. Respondent shall submit one (1) original, and five (5) copies in a sealed package, clearly marked "Near West San Antonio Opportunity Zone Strategic Plan," and shall include a USB stick with proposal contents in PDF format.
- iii. Please include section dividers between each section for Sections A – C.
- iv. Responses received and packaged other than as described above will not be reviewed.
- v. Deliver submittals to: Hilda Santiago, at:

Mailing Address:

Westside Development Corporation
RFP for NEAR WEST SAN ANTONIO OPPORTUNITY ZONE STRATEGIC PLAN
P.O. Box 37569
San Antonio, TX 78237

Physical Address:

Westside Development Corporation
RFP for NEAR WEST SAN ANTONIO OPPORTUNITY ZONE STRATEGIC PLAN
630 SW 41st
San Antonio, TX 78237

NOTE: The WDC will send an e-mail acknowledging receipt of all submitted Proposals to the Contact Person listed in the proposal.

- vi. All timely proposal responses become the property of the WDC upon receipt and will not be returned. The materials submitted must be enclosed in a sealed envelope, box, or container; the package must show clearly the submittal deadline. 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 WDC 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.

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

VIII. RESTRICTIONS ON COMMUNICATION

- a.** Respondent is prohibited from soliciting or lobbying activities with WDC employees and board members regarding this RFP from the time it is publicly disseminated to the time the prohibition is lifted by WDC in writing.
- b.** All questions concerning this RFP shall be submitted, in writing, to the WDC at Hilda@westsidedevcorp.com. All questions must be received by 4:00 PM CST on Friday, January 11, 2019. Any questions received after that time will not be addressed.
- c.** The WDC 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.** 40% - Background and Experience
- iii.** 40% - Proposal

**RFP ATTACHMENT 1
NEAR WESTSIDE OPPORTUNITY ZONES**

