



**REQUEST FOR PROPOSALS
RESEARCH & PLANNING CONSULTANT
Statewide [Real Estate] Emerging Developers
March 2024**

INTRODUCTION

LISC Houston in partnership with LISC San Antonio (hereto referred as “LISC”) is issuing this Request for Proposals (RFP) to seek a qualified consultant or company to create a uniform training program that can be implemented in both Houston and San Antonio markets as well as shared across Texas to advance the number of [real estate] emerging developers in the state.

DISTRIBUTION & SELECTION TIMELINE

This RFP will be posted on LISC’s websites (<https://www.lisc.org/houston/> & <https://www.lisc.org/san-antonio>) from **Tues. March 5, 2024** through **Tues. March 26, 2024** when responses to the RFP are due. The consultant(s) selected for the work will be notified by close of business on **Fri. April 12, 2024**, or earlier.

BACKGROUND

Houston

Since 1989, LISC Houston has been at the forefront of addressing affordable housing in the Greater Houston Area. As one of the country’s largest community development financial institutions, we work with residents and partners to close systemic gaps in health, wealth and opportunity and advance racial equity so that people and places can thrive. For 35 years, LISC has invested more than \$563 million in Houston communities, leveraging an additional \$1.5 billion. This investment has created more than 10,000 affordable homes and apartments and 2 million square feet of commercial, community and educational space, as well as helped thousands of people improve their financial health and strengthen their neighborhoods. For more information, visit www.lisc.org/houston.

San Antonio

Since the San Antonio office of Local Initiatives Support Corporation opened in 2016, we have invested \$94 million and leveraged \$266 million to create over 2,000 affordable homes and apartments, develop 64,489 sq. ft. of commercial space and support dozens of local non-profit and community-based organizations with both funding and technical assistance. LISC San Antonio works in community to build wealth, health, and power for people who have been systematically excluded or disadvantaged by working to sustain and expand homeownership; build assets in low-wealth populations; integrate housing, health and services; lead advocacy and systems change; and build local capacity. For more, visit <https://www.lisc.org/san-antonio>.

ABOUT THE PROJECT

The purpose of this initiative is to create a standardized training program for emerging developers, with a focus towards those who have faced tremendous barriers to success. This program will build their skills and capacity in all stages of the development process. This includes the ideation phase, land acquisition, financing, construction, and completion of

Local Initiatives Support Corporation

602 Sawyer Street, Suite 205, Houston, TX 77007 • T 713.334.5700 • lisc.org/houston

A United Way partner

the project. This training program will then be implemented in both Houston and San Antonio while also being shared with other interested Texas communities.

This initiative is part of a three year, three phase process led by LISC Houston in collaboration with LISC San Antonio.

Year One (2024) is focused on research and planning; Year Two (2025) on training development & implementation; and Year Three (2026) on implementation, evaluation, and impact.

In Year One (April 2024 – December 2024), to implement this initiative, both offices will work with the consultant(s) through a nine-month research and evaluation process to research available housing development and finance related training programs across the country, determine the needed training content most relevant for the Texas market (with a primary focus on Houston and San Antonio), optimal delivery process, and most effective training structure to increase the presence of emerging developers in the development industry and build their capacity in the Texas market. At the same time, LISC in both Houston and San Antonio will implement related training programs to learn more about the benefits and community demand for these resources. Through this work, LISC will create an ecosystem of developers and cultivate their ability to support each other and network/partner with other mission- aligned developers.

In Year Two, based on these learnings, LISC and our consultant will create a training program with standardized curriculum that still allows for local context, which will be implemented in both cities in Year 2/3 of the initiative. This training program will also focus on creating supportive cohorts to address issues and challenges unique to them so they can tackle larger and more complex projects that meet the needs of underserved and mixed-income communities. For example, the location and timing of the training sessions will consider issues relating to childcare and other personal/professional responsibilities, and events will include input and presentations from experienced developers to help participants overcome the exclusionary culture in development.

In Year Three, the final phase of the initiative, LISC will evaluate the training program while also sharing it with other Texas cities through conferences, state-wide organizations, and other peer meetings. Finally, LISC will create a sustainability plan for the initiative and engage with other LISC markets through a Community of Practice to share our program for other markets to utilize, adapt and inform.

Our hypothesis is that creating a design studio style of training program, that blends curricula with practicum and real-life project application, supported by the review and evaluation from industry experts will yield the highest outcomes.

Output: the program must have the capacity to serve up to 50 developers with approximately 20 developers graduating in each market.

Outcome: as a result of this work, the developers will yield approximately 140 units across both markets of affordable housing in the first three years of completion.

Local Initiatives Support Corporation

TIMELINE

This RFP is to support the work for year one of the initiative.

Discovery Phase: April 22 – May 20, 2024

- Orientation and onboarding to the project
- Review current research conducted and existing training curriculum used
- Outcome: provide initial feedback and reflection

Research: May 20 – Sept 23, 2024

- Research external industry leading practices (interviews, focus groups, literature review)
- Research and assess external developer training programs, curricula, providers, and content (interviews, focus groups, literature review)
- Outcome: deliver analysis & recommendations

Review & Assess: Sept 20 – Oct 21, 2024

- Review and assess findings; discuss and identify further research needs or areas of opportunity to further investigate
- Execute against findings
- Outcome: deliver analysis and provide scope for project planning

Project Planning: Oct 21 – Dec 16, 2024

- Co-create project plan for year two
- Identify partnerships and relationships needed to be cultivated
- Support (and where appropriate) lead the partner relationship cultivation

(Optional) Value-Added Products/Services

Consultant(s) may propose optional/value-added products and/or services. Consultant(s) must identify the use, functionality, and purpose of the optional/value-added item(s), and how the project would benefit from electing to procure those item(s). Pricing for proposed item(s) shall be clearly labeled as optional/value-added. Information regarding these products should be included in your proposal.

Location: Houston, TX (remote/hybrid)

CONSULTING SERVICES NEEDED AND SCOPE OF WORK ELEMENTS

Consultant will work in collaboration with LISC to identify the specific needs, barriers, and opportunities for emerging developers in entering and succeeding in the affordable housing market in Houston and San Antonio. Assess existing programs, initiatives, and resources aimed at supporting emerging developers in affordable housing development. Explore best practices and successful models for capacity building, mentorship, and technical assistance targeted at emerging developers. Gather input and insights from key

Local Initiatives Support Corporation

602 Sawyer Street, Suite 205, Houston, TX 77007 • T 713.334.5700 • lisc.org • 3 of 7

stakeholders, including existing emerging developers, industry experts, community organizations, government agencies, and financial institutions. Develop a framework for program curriculum, including program implementation and evaluation to assess the effectiveness, impact, and outcomes of the proposed program and curriculum.

Consultants are tasked with delivering against the timeline above on each of the following phases to produce the following outcomes:

Research & Planning (Year One)

- Conduct a comprehensive review on the challenges, opportunities, and best practices related to supporting emerging developers in affordable housing in Houston and San Antonio markets.
- Collect and analyze data through interviews, focus groups, surveys, and/or case studies with emerging developers, industry stakeholders, and other relevant parties.
- Research will include – but not limited to - qualitative and quantitative information collection from national projects and local partners.
- Identify key themes, trends, and insights from the research findings to create a scalable, duplicatable model for a program to include up to 50 developers with approximately 20 developers graduating in each market.
- Develop a set of recommendations for the design and implementation of a program and curriculum tailored for emerging developers.
- Develop a comprehensive criteria framework for identifying ideal candidates for the program, along with potential partnership opportunities for developers who do not meet the baseline requirements. This framework will serve as a guiding document for selecting participants and facilitating partnerships to ensure inclusivity and diversity within the program.

Review & Assess:

- Research report summarizing key findings, insights, and recommendations.
- Data analysis including raw data, analysis results, and visualizations.
- Stakeholder engagement summary outlining feedback and input received from key stakeholders.

Project Planning:

- Design a framework for program evaluation, including defining key performance indicators, data collection methods, and evaluation criteria.
- Create and execute a comprehensive research methodology that would help further define the problem statement, success metrics, primary and secondary target audiences/beneficiaries, and how we measure and affect change.
- Create a research brief that pulls together the findings, gaps in capacity for emerging developers, and recommendations.

Consultant Qualifications

LISC is seeking a consultant with experience in working across non-profit, for profit and government sectors, leading strategic planning, project management, and program design with a diversity, equity, and inclusion focus. Expert in strategic thinking/planning with distinction experience in research and program development and integration.

Understanding and working knowledge with housing development, collaborative projects, data collection/analysis, research, and having worked in other major markets (ex. Dallas, Atlanta, Los Angeles, etc.).

Pricing

Due to the complexity of this project LISC understands that consultant(s) must have the flexibility to customize pricing. Consultant(s) are encouraged to submit an itemized Fee Schedule for all scope of work items where the consultant(s) possesses the capabilities to perform and deliver. Pricing must be all inclusive. At a minimum, Fee Schedule shall clearly identify the following:

- Total cost and all fees associated with the Discovery, Research, Review & Assess, Project Planning, and Optional Value-added Products/Services. An itemized pricing structure for payments by milestones or deliverables.
- Any travel expenses will be absorbed in total cost per phase and not billed separately.
- All fees for (Optional) Value-Added Products/Services (if applicable).

RENEWAL OPTIONS

LISC may consider annual renewal options, renewable one (1) year at a time, based upon updated terms, conditions and pricing as well as grant funding prohibiting. Renewal is subject to approval by LISC. LISC reserves the right to rebid at any time as is in its best interest and is not automatically bound to renew.

RFP RESPONSE INSTRUCTIONS

Consultants must submit a complete response package that includes the following items in

1. **[5 pts]** Proposal cover page with the following information: Name, Company Name (if applicable), Address, Phone, Email, Website, EIN,
2. **[40 pts]** A narrative that describes how the consultant meets the required qualifications, and a proposed methodology of executing against each of the scope of work elements: discovery phase, research, review & assess, project planning, and optional – value added products/services.
3. **[30 pts]** Bio(s) of principal participants, company profile (if applicable), and a list of clients worked with and project description that demonstrates your relevant and most recent experience. Preference to a proven track record of research, evaluation, analysis, stakeholder relationship building, and project planning/development. (LISC reserves the right, during the proposal review stage, to

request letters of reference from up to three clients with whom the consultant has worked in the past three years; however, the consultant is not required to submit reference letters with their response to this RFP.)

4. **[25 pts]** Consultant’s proposed pricing, using the following table structure below. Consultant may choose to bid for all or some of the task areas.

TASK	Key Activities	Cost Structure	Total Cost	Timeline
Discovery Phase				
Research				
Review & Assess				
Project Planning				
(Optional) Value-add products/ services				
Total Cost				

SUBMISSION

Proposals should be submitted in PDF format and not exceed 25MB. Please submit your proposal via email with “Emerging Developers- *insert company name*” in the subject line to Jason Grant via email at jgrant2@lisc.org by **5pm CT on Tues. March 26, 2024**. Incomplete or late proposals will not be considered.

EVALUATION REVIEW AND SELECTION PROCESS

LISC will establish a review committee to evaluate proposals based upon: responsiveness to the criteria described above, completion of experience, rate/price, and availability. Selected consultants will be invited for a 30-minute interview, tentatively on **Thurs. April 4, 2024, between 9:30am - 12:00pm CT**, before a determination is made. Selected consultants may be asked to revise their proposal based on the interview discussion. In such case, revisions will be **due 12:00pm CST, Tues. April 9, 2024**. Determination will be announced by **5:00pm CT on Fri. April 12, 2024**.

Local Initiatives Support Corporation

LISC is committed to working with SBEs, MBEs, and WBEs, and encourages proposals from SBEs, MBEs, and WBEs. LISC IS AN EQUAL OPPORTUNITY EMPLOYER COMMITTED TO DIVERSITY & INCLUSION.

Local Initiatives Support Corporation

602 Sawyer Street, Suite 205, Houston, TX 77007 • T 713.334.5700 • lisc.org • 7 of 7