



# Neighborhood Housing Services of San Antonio

**Neighborhood Housing Services of San Antonio**

**Request for Proposal**

**Community Development Financial Institution Consultant**

**Date: April 10, 2026**



# Neighborhood Housing Services of San Antonio

## **CONFIDENTIAL INFORMATION**

This document and the information contained within are confidential. It has been distributed for your express use for the purpose of responding to this specific “Request for Proposal” (RFP) only and may not be duplicated or distributed to any third party without consent from Neighborhood Housing Services of San Antonio (hereinafter referred to as “NHSSA”). Any other use is strictly prohibited by NHSSA.

### **Purpose**

The purpose of this RFP is to seek qualified Community Development Financial Institution (CDFI) consultants to administer a comprehensive assessment of our organization. The selected consultant will evaluate NHSSA’s current lending operations and business strategies, recommend strategies to enhance our effectiveness, and financial capacity and impact on our community. In addition, the consultant will help identify new lending products, implement new business strategies, identify innovative resources and assist with annual certification submission.

### **Background**

Since NHSSA’s establishment in 1985, the organization has served the City of San Antonio and Bexar County with comprehensive affordable housing development, home rehabilitation, rental housing, second mortgage lending (down payment/closing cost assistance), and homeownership purchase and preservation counseling services. Our mission is to build successful families and communities through housing opportunities, targeting low- and moderate-income families who earn up to 120% AMI.

As a U.S. Treasury CDFI mortgage lender, a U.S. Department of Housing and Urban Development (HUD) Housing Counseling Agency and a HUD Community Housing Development Organization (CHDO) affordable housing developer, NHSSA is the only San Antonio nonprofit offering an in-house continuum of affordable housing-related services designed to move a low- to moderate-income family from renting, to aspiring to buy a home, to sustainably securing their dream residence and preserving it generationally as financially capable owners. We accomplish our goals by reflecting our work to mirror the roots of the organization – building successful families through access to appropriate and affordable housing and through financial wellness – and using this ideal to craft innovative ways our core services can be repurposed to benefit and empower even the most vulnerable members of our community.

### **Qualifications of Respondent**

Respondents should have considerable experience with CDFI and mortgage lending products:

- a. Must have at least 10 years of experience in CDFI compliance, program development, business strategies and certification specifically in single/multi-family housing lending.
- b. Extensive experience working with CDFIs, preferably in Texas.
- c. Proven track record of conducting strategic assessments and developing actionable plans.
- d. In-depth knowledge of the challenges and opportunities facing LMI individuals.
- e. Strong analytical, communication and stakeholder engagement skills.
- f. Familiarity with financial services, micro-lending and economic development.

### **CDFI Consultant Role & Responsibilities**

The CDFI Consultant will be responsible for the following (including but not limited to):



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- The Consultant will assist in the development of effective and sustainable lending products.
- The Consultant will evaluate NHSSA's current lending products, financials, and business strategies and make recommendations to improve our CDFI services.
- The Consultant will conduct CDFI related research, networking with various CDFI professionals and/or funding entities and make professional recommendations as needed.
- The Consultant may recommend qualified personnel to support all aspects of the CDFI Lending Department to include regulatory compliance, sales, origination, processing, underwriting, loan closing and servicing.
- The Consultant will assist NHSSA to strategize and develop loan products and services to meet the needs of low- and moderate-income residents of San Antonio and surrounding areas.
- The Consultant will identify local and national funding opportunities and help develop quality funding proposals to increase both our operational and lending capital for the CDFI Loan Program.
- The Consultant will guide and provide resources to staff in the implementation of any new lending products and business strategies.

## **Other Terms & Conditions**

### *Affirmative Action, Minority and Woman Owned Businesses*

NHSSA will affirmatively ensure that in any contract entered into pursuant to this RFP, minority and woman owned business enterprises will be afforded full opportunity to submit proposals in response to this invitation and will not be discriminated against in consideration for an award on the ground of sex, race, color, or national origin.

### *Debarment and Disqualification*

Respondent nor any other person associated with Respondent in the capacity of owner, partner, director, officer or manager:

1. Is not currently under suspension, debarment, voluntary exclusion or determination of ineligibility by any federal agency;
2. Has not been suspended, debarred, voluntarily excluded or determined ineligible by any state or federal agency within the past three years;
3. Does not have any proposed debarment pending; and
4. Has not been indicted or had a civil judgment rendered against it by a court of competent jurisdiction in any matter involving fraud or official misconduct within the past three years.

### *Contractual Contents*

Respondent's response to this RFP will be included in whole or by reference in the final contract.

### *Insurance Requirements*

All respondents shall provide proof of their own insurance as reflected below. Upon entering a contract, any selected respondent will be required to provide a certificate of insurance naming NHSSA as an additional insured. Additional insurance requirements may be identified prior to entering a contract, as is appropriate to the scope. Insurance policies must meet the insurance thresholds outlined below:

| TYPE   | AMOUNTS  |
|--|--|
| Workers' Compensation<br>Employers' Liability  | Statutory<br>\$1,000,000/\$1,000,000/\$1,000,000   |
| Commercial General Liability, to include coverage for the following:<br>a. Premises/Operations<br>b. Products/Completed Operations<br>c. Personal/Advertising Injury<br>d. Environmental Impairment/Impact- sufficiently broad to cover disposal liability | For Bodily Injury and Property Damage of \$1,000,000 per occurrence;<br>\$2,000,000 General Aggregate or its equivalent in Umbrella or Excess Liability Coverage |
| Automobile Insurance Liability<br>Coverages for any vehicles used at the Work site and registered to the CONTRACTOR, the CONTRACTOR'S sub-contractors, or any of their employees   | Minimum of \$500,000.  |
| Professional Liability   | \$1,000,000 per claim by reason of any act, malpractice, error or in the professional service.   |

### **Procurement Process**

NHSSA has established this procurement process to identify qualified Respondent to provide CDFI Consulting Services to NHSSA. In responding to this RFP, Respondent will be required to demonstrate their experience and capacity in providing these services. NHSSA will review all responsive proposals to this solicitation. NHSSA will award a contract based on qualifications first and cost reasonableness second.

NHSSA intends to award one qualified Respondent as a result of this solicitation to undertake projects under the program. City and Federal requirements that apply to this program may include prevailing wages, environmental review, the Uniform Relocation Act and Section 3.

### **Evaluation Criteria**

The proposals submitted will be evaluated based on experience and expertise using the information requested and submitted pursuant to requirements outlined in this RFP. An evaluation committee will review each proposal and evaluate against the following criteria:

- a. Experience with similar projects - 35 points
- b. Relevant qualifications of key personnel - 25 points
- c. Comprehensive Approach - 25 points
- d. Proposed schedule and ability to meet applicable deadlines - 10 points
- e. Respondent is an MBE/WBE, and/or has experience in meeting Davis-Bacon (labor compliance) and HUD Section 3 requirements - 5 points

### **Proposal Format Requirements**

Proposals must be organized in the following manner:

- a) Attachment A – Proposal Cover Sheet

- b) Attachment B – Proposal Narrative Responses
- c) Attachment C – Confidentiality Notice
- d) Attachment D – Cost Proposal

Proposals shall not exceed 10 (8 ½ X 11) pages nor have a font size smaller than 11 pt.

### **Schedule of Events**

The following schedule outlines the approximate time frame of the activities that will be followed to assist in the selection process. The schedule and activities, except for the deadline for receiving proposals, are subject to change.

| ITEM                                 | DATE                       |
|--------------------------------------|----------------------------|
| RFP Issue Date                       | April 10, 2026             |
| Pre-Submission Conference (Optional) | April 17, 2026 @10:00 a.m. |
| Question Submission Deadline         | April 21, 2026 @ 2:00 p.m. |
| Proposal Due Date                    | April 28, 2026 @12:00 p.m. |
| Contract Award Date (Estimated)      | May 13, 2026               |

### **Pre-submission Conference (Optional)**

NHSSA will host a virtual meeting on April 17, 2026, at 10:00 a.m.

<https://teams.microsoft.com/meet/215969280051246?p=GNsqvIRbMcYuzdeumf>

### **Proposal Submission Methods**

NHSSA will accept hard copy and electronic proposal submissions through **12:00 p.m. (Central) on April 28, 2026.**

**Hard copy proposals can be submitted to the NHSSA at the following address:**

Address: NHSSA  
 851 Steves Avenue  
 San Antonio, TX 78210  
 Attention: Brandee Perez, Executive Director

Office Hours: Monday through Thursday 9:00 a.m. – 5:00 p.m. and Friday from 9:00 a.m. – 1:00 p.m.

The envelope must have the following notation on the bottom left-hand corner of the proposal, **“CDFI Consulting Services Proposal.”**

OR

**Electronic proposals can be emailed** to [bperez@nhs-satx.org](mailto:bperez@nhs-satx.org). If you do not receive an email confirmation within 24 hours of submission, please call Brandee Perez at (210) 533-6673 to ensure your proposal was received. All proposals will become property of NHSSA upon submission.

### **Additional Notices**



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NHSSA reserves the right to accept or reject any or all proposals, to take exception to these RFP specifications, or to waive any formalities. NHSSA specifically reserves the right to negotiate a contract with the selected respondent. An officer of the company capable of binding the offer must sign proposals.

NHSSA encourages responses from small, minority-owned, women-owned and Section 3 businesses as well as from firms that partner with such disadvantaged business in a substantive way.

## **Solicitation Questions**

Written questions regarding this solicitation can be emailed to Brandee Perez, Executive Director, at: [bperez@nhs-satx.org](mailto:bperez@nhs-satx.org)

The deadline for written questions is **2:00 p.m. on April 21, 2026**. Responses to questions will be posted at the website listed below within 72 hours of submission.

<https://www.nhssofsa.org/>

## **Attachment A – Proposal Coversheet**

### **Request for Proposal (“RFP”) for CDFI Consulting Services to Neighborhood Housing Services of San Antonio (NHSSA)**

Name of Respondent: \_\_\_\_\_



# Neighborhood Housing Services of San Antonio

Company Name: \_\_\_\_\_

EIN #: \_\_\_\_\_

DUNS #: \_\_\_\_\_

Principal address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Primary Point of Contact: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Contract Signatory: \_\_\_\_\_

## Minority and Woman Owned Businesses Questionnaire

|   |  |
|---|--|
| Type of Business:<br>Non-Profit [ ]<br>Sole Proprietorship [ ]<br>Partnership [ ]<br>Limited Liability Corporation [ ]<br>Corporation [ ] | Is the business 51% or more owned by:<br>American Indian [ ]<br>Asian [ ]<br>Black [ ]<br>Hispanic [ ]<br>Female [ ]<br>Other [ ] _____ (please specify) |
|---|--|



# Neighborhood Housing Services of San Antonio

## *Proposer's Statement*

The undersigned Proposer hereby states that by completing and submitting this Form and all other documents within this proposal submittal, they are verifying that all information provided herein is, to the best of their knowledge, true and accurate and that if NHSSA discovers that any information entered herein to be false, such shall entitle NHSSA to not consider or award this contract with the undersigned party. Further, by completing and submitting the proposal submittal, the undersigned proposer is thereby agreeing to abide by all terms and conditions pertaining to this RFP as issued by the NHSSA, either in hard copy or electronically.

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Authorized Contract Signatory (Signature)

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Authorized Contract Signatory (Print)

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Title

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Date

**Attachment B – Proposal Narrative Responses**

1. Provide a brief overview of the consultant’s background and qualifications.
2. Detailed description of the proposed approach and methodology for conducting a strategic assessment of NHSSA.
3. Outline the workplan, including key milestones and a timeline for completion.
4. Provide three projects similar to this RFP along with three references.
5. Any additional information that supports the proposal.

**Attachment C – Confidentiality Notice**

Each respondent specifically agrees, as a pre-condition for the opening and review of the proposal submitted by each respondent, that the information relating to prices, material designed as trade secrets or other propriety data submitted by every other respondent, and NHSSA’s internal evaluation of each proposal, is confidential.

Each respondent recognizes that such information may be considered not subject to confidential and/or proprietary protection with respect to a Public Records request made to NHSSA by any other person or entity not a Respondent to this Request and that any and all such information may be subject to disclosure. Each Respondent is further advised that all or some of the terms and conditions of any agreement ultimately executed may be subject to full disclosure, and each Respondent waives any right to object to any such disclosure.

Respondent Agrees (please sign and date)

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Signature

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Name

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Title

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Date



# Neighborhood Housing Services of San Antonio

## **Attachment D – Cost Proposal**

The respondent must provide a detailed budget for the proposed project.