



City of San Antonio

Agenda Memorandum

File Number:

Agenda Item Number: 22

Agenda Date: February 20, 2025

In Control: City Council A Session

DEPARTMENT: Neighborhood and Housing Services

DEPARTMENT HEAD: Veronica Garcia, Director

COUNCIL DISTRICTS IMPACTED: Citywide

SUBJECT:

Agreement with Englert & Co. dba Texas True Tax for the Property Tax Help Campaign

SUMMARY:

Ordinance authorizing a professional services agreement with Englert & Co. dba Texas True Tax for services related to filing property tax exemptions and protesting property tax assessments associated with the Property Tax Help Campaign in an amount up to \$50,000.00 for the term beginning upon award through September 30, 2025, with an option to renew for one, one-year term, and a total contract amount up to \$100,000.00, inclusive of renewals. Funding is available from the General Fund FY 2025 Adopted Budget. Funding for subsequent years is contingent upon City Council approval of the annual budget and funds.

BACKGROUND INFORMATION:

Submitted for City Council consideration and action is a proposal submitted by Englert & Co. dba Texas True Tax to provide services related to filing property tax exemptions and protesting property tax assessments associated with the Property Tax Help Campaign.

City Council allocated \$250,000.00 annually for a Property Tax Help Campaign (PTHC) beginning in FY 2023. The PTHC aligns with two key strategies in the Strategic Housing

Implementation Plan (SHIP), a 10-year, cross organizational plan for housing affordability in the San Antonio community. First, it is a public information campaign designed to empower homeowners. Second, the campaign helps homeowners decrease their tax burden by assisting them with filing appropriate property tax exemptions and appealing their property tax assessments.

Each session includes a short presentation followed by individual assistance to homeowners who have questions or need help completing property tax forms. Copying, printing, notary services and filing are available for free at each in person session. Over the last two years the campaign has reached over 2,595 homeowners citywide. Each year, at least one session is hosted in every council district.

The City issued a Request for Proposals (RFP) for “Property Tax Help Professional Services – Direct Services” (RFP 24-177, 6100018488) on October 21, 2024, with a submission deadline of November 20, 2024. The RFP was advertised in the HartBeat, TVSA channel, the City’s Bidding & Contracting Opportunities website, the San Antonio e-Procurement System and an email notification was released to a list of potential respondents. Two proposals were received, and both proposals were deemed responsive for evaluation.

The evaluation committee consisted of representatives from the Neighborhood and Housing Department and the Bexar County Appraisal District. The Finance Department, Procurement Division assisted by ensuring compliance with City procurement policies and procedures. The evaluation of each proposal was based on a total of 100 points: 20 points allotted for experience, background, and qualifications; 40 points allotted for proposed plan; and 15 points allotted for respondent’s price schedule; 5 preference points were allotted for the Small Business Enterprise (SBE) Prime Contract Program; 5 preference points were allotted for the Minority Women Business Enterprise (M/WBE) Prime Contract Program; 10 points allotted for the Local Preference Program and 5 points allotted for the Veteran-Owned Small Business Preference Program. Additional categories of consideration included references and financial qualifications.

The evaluation committee met to discuss and score the two proposals on December 18, 2024. The top ranked firm was Englert & Co. dba Texas True Tax and is recommended for award.

The initial term of the agreement will be for the period upon award by City Council through September 30, 2025, with one additional, one-year renewal at the City’s option which will also be authorized by this ordinance.

ISSUE:

This contract with Englert & Co. dba Texas True Tax (TTT) will provide the Neighborhood & Housing Services Department (NHSD) with services to conduct the 2025 Property Tax Help Campaign sessions, which will be held from April 2025 through May 2025. The campaign will include 12 in person sessions this year and three virtual sessions. Each council district will receive at least one session.

TTT will present material related to property taxes, exemptions, the protest process at all sessions and will be responsible for overseeing and staffing the workshop portion of the in-person sessions,

which will provide individual assistance to attendees. The virtual sessions will not have individual assistance during the session. However, the TTT will follow up with interested virtual session attendees to ensure successful protest or exemption filing, identify barriers to completion (if any), and refer attendees to appropriate assistance.

This year, TTT will lead at least one presentation in English, Spanish, Arabic, and Vietnamese.

The proposed professional services agreement includes an initial contract amount not to exceed \$50,000.00 and the option for a one-year extension for a total amount not to exceed \$100,000.00, contingent on funding availability and at the discretion of the department.

The Local Preference Program applied to this contract; the recommended firm is a local business.

The Veteran-Owned Small Business Preference Program applied to this contract; however, the recommended firm is not a Veteran-Owned Small Business.

ALTERNATIVES:

Should this contract not be approved, the implementation of the FY 2025 campaign will be delayed.

FISCAL IMPACT:

An ordinance authorizing a professional services agreement with Englert & Co. dba Texas True Tax for services related to filing property tax exemptions and protesting property tax assessments associated with the Property Tax Help Campaign in an amount up to \$50,000.00 for the term beginning upon award through September 30, 2025, with an option to renew for one, one-year term, and a total contract amount up to \$100,000.00, inclusive of renewals. Funding is available from the General Fund. Funding for subsequent years is contingent upon City Council approval of the annual budget.

RECOMMENDATION:

Staff recommends approval.