



**Request for Proposal**

**Chautauqua County Housing Market Assessment and Development Strategy**

**Chautauqua County Partnership for Economic Growth (CCPEG)  
Chautauqua Region Economic Development Corporation (CREDC)**

**PROPOSAL NO: RFP-1-22 PLAN**

**NAME OF RFP: Chautauqua County Housing Market Assessment and  
Development Strategy**

<b>PROPOSAL ISSUE DATE:</b>	<b>November 28, 2022</b>
<b>QUESTIONS DUE BY:</b>	<b>December 12, 2022</b>
<b>PROPOSAL DUE DATE:</b>	<b>January 9, 2023</b>
<b>TIME:</b>	<b>3:30 PM</b>

**All proposals & questions should be submitted to:**

**ATTN: REBECCA WURSTER, PLANNING COORDINATOR**

**214 Central Avenue Suite 144  
Dunkirk, New York 14048**

**EMAIL: wursterr@chqgov.com  
PH. 716-363-3620**



## Statement of Work

### Objective

The Chautauqua County Partnership for Economic Growth (CCPEG), is soliciting proposals from qualified firms to undertake an assessment of the housing market and a housing development strategy in Chautauqua County. The Chautauqua Region Economic Development Corporation (CREDC) has allocated \$62,500 to this effort. The objective of this project is to develop an assessment and development strategy that can be used to attract investment and development of certain housing types in targeted areas of the County.

### Background Information and Purpose

Chautauqua County is the western-most county in New York State, and has a population of approximately 125,000 people. The County is made up of 42 mostly rural municipalities (2 cities, 27 towns, and 13 villages). According to the U.S. Census Bureau, Chautauqua County has a total of 66,247 housing units. A county-wide housing market assessment and development strategy has been identified as a priority project in part, due to anticipated long-term impacts from the COVID-19 pandemic. This includes the potential increase of remote work and the desire for residents to live in more rural settings. In addition, Chautauqua County, similar to many counties across the US, have a large percentage of manufacturers hiring a wide range of positions. These new jobs need attractive housing options in order to live, work, and play in Chautauqua County.

### Project

This project will develop strategies that will result in investment and the attraction of developers engaged in county-wide housing projects. This effort will involve two phases. The first phase will be an inventory and analysis of the county-wide housing market. The second phase will be an analysis of future housing needs. Specifically, the project will include an inventory of existing housing options, identify significant gaps in the available housing inventory, and recommend strategies to address gaps, identify specific housing development locations, potential incentives, and actions to remove regulatory barriers.



## Scope of Work

### 1. *Project Kickoff*

- a. Conduct a project kickoff meeting with the Chautauqua County Housing Market Steering Committee (HMSC) to discuss the purpose of the project and to revise the project scope and schedule as needed.
- b. This meeting will include identifying any key issues for the project, including potential obstacles for the desired outcomes of the project.

Phase I:

### 2. *Chautauqua County Housing Market Conditions*

- a. Identify the County's housing landscape to better understand current conditions, housing market characteristics and trends, regional setting, market gaps, housing demand, housing affordability, equity, and opportunities.
- b. Develop a map that includes a current display of the housing typology to better understand the County's current housing stock, gaps, and to categorize levels of demand throughout the County.
  - i. Housing market map of Chautauqua County should show the contours of demand-where it is strongest and weakest based on home values, rents, vacancies, etc. The types of fiscal gaps that exist will be varied, and tools will have to be calibrated accordingly.
- c. Present population and housing characteristics of the County's various market types in qualitative and quantitative ways.
  - i. Chautauqua County's housing market varies from community to community. It is important that this assessment and development strategy looks at these varying markets to better understand their similarities, differences, and trends.
  - ii. Qualitative and quantitative data collection could be accomplished through focus group interviews, public forums, Census data collection, existing municipal housing initiative compilation, local and regional developer interviews.
- d. Present information revealing critical disparities in household distribution between regional housing markets.
  - i. Chautauqua County competes with surrounding counties in New York State, as well as the boarding state of Pennsylvania. Chautauqua County offers unique job opportunities and a superb quality of life, yet may be lacking the diversity in housing options that are more attractive and available in the surrounding region.
- e. Present an overview of emerging market issues-including affordability and the expansion of multiple housing opportunities.
  - i. The Chautauqua County Housing Market Assessment and Development Strategy should include a discussion about affordable housing and how it fits into the broader picture, as well as how the placement and scale of affordable housing efforts will influence market-rate efforts.



Phase II:

3. *Tactical Direction for Chautauqua County's Housing Market Needs*
  - a. Estimate the demand for various housing types and determine a focused investment strategy (FIS).
    - i. Identify types of market-rate housing rehabilitation/production that best fit community goals (downtown revitalization, neighborhood preservation, talent attraction, housing equity, etc.) and the barriers-largely financial, which keep them from being realized.
    - ii. Suggest strategies for incentivizing housing stabilization, rehabilitation, preservation.
4. *Chautauqua County Housing Market Strategies & Action Plan*
  - a. Identify a flexible mechanism for supporting the development of high-priority housing projects (market-rate, senior, workforce, and mixed-income). This may include, but is not limited to, a mechanism that pools local/regional sources of equity, brings in regional banks, and provides the management capacity to execute deals with multiple partners.
  - b. Define the environment and incentives that attract developers and responsible, community-based investment.
  - c. Determine the type of tools that will guide homeownership promotion, preservation, housing equity and affordability.
  - d. Define and identify the appropriate locations and ownership for market-rate housing developments, senior housing developments, mixed-income housing developments, and other housing developments identified as opportunities to expand upon within Chautauqua County while preventing gentrification of neighborhoods or communities.
5. *Implementation, Funding, Monitoring, and Progress Evaluation*
  - a. Develop a matrix and prioritize the above strategies and an action plan in order to move forward with implementation
  - b. In order to implement the strategies and actions, a list of funding opportunities that are applicable to each recommendation should be included.
  - c. Identify a way to systematically measure and report progress towards meeting the goals and objectives that were included in the development strategy.
  - d. Tools used to evaluate the resultant product, process, and impact that implementation may have, should be recommended.

\* This Scope of Work is by no means "locked in". Assuming the consultant understands where we are and where we're trying to go, we welcome other methods of study that we may not have included in the Scope of Work that can lead to fulfilling our objectives.



### **Final Deliverable**

The final project deliverable will be a comprehensive report including sections on the Chautauqua County Housing Market Conditions, Tactical Direction for Chautauqua County's Housing Market Needs, Chautauqua County Housing Market Strategies and Action Plan, and the Implementation, Funding, Monitoring, and Progress Evaluation.

10 print copies of the final document are to be delivered to the Chautauqua County Partnership for Economic Growth, as well as a digital pdf version and any other relevant documents prepared during the project process.

### **Project Timeline**

CCPEG envisions that this project should be able to be completed within a 12 month timeframe. CCPEG envisions a start date in the first quarter of 2023.



## GENERAL TERMS AND CONDITIONS

### SECTION 1: INSTRUCTIONS

- 1.1. RFP - The services that are required herein are not subject to formal competitive bidding under Section 103 of New York State General Municipal Law. CCPEG Purchasing Policy rules in this case require selection of a contractor through a Request for Proposal process.
- 1.2. CCPEG encourages all qualified applicants, including Minority-Owned Business Enterprises, Women-Owned Business Enterprises, Small Business Enterprises and Disadvantaged Business Enterprises, to partake in the solicitation of these and all other services. The successful proposer must be an Equal Opportunity Employer.
- 1.3. CCPEG is exempt from all Federal and State taxes.
- 1.4. Insurance shall be in place prior to execution of the agreement and shall be up to date and maintained for the contract term. It is preferred that you attach samples or original certificates of insurance along with your proposal.
  - Within (5) five days receipt of the notice of award the proposer shall supply up-to-date certificates of insurance. Certificates may be e-mailed to the insurance department representative at the following address email [aldrichn@chqgov.com](mailto:aldrichn@chqgov.com).
  - Failure to do so may be cause for the CCPEG to declare a proposal non-responsive, with the result that the award may go to the next highest scoring proposal.
- 1.5. A copy of the CCPEG Minimum Insurance Requirements is attached, along with a sample copy of the contract or agreement of service with terms and conditions.
- 1.6. The successful proposer must obtain CCPEG approval prior to utilizing a subcontractor in order to perform the requirements of this RFP.



**SECTION 2: SUBMISSION OF PROPOSALS:**

Sealed proposals shall be submitted to Chautauqua County Partnership for Economic Growth 214 Central Avenue Suite 144 Dunkirk, New York, 14048 by **January 9, 2023 at 3:30p.m.**

Please include the following information on the front of the sealed envelope:

<b>Attention:</b>	<b>Rebecca Wurster, Planning Coordinator</b>
<b>Proposal No:</b>	<b>RFP-1-22 PLAN</b>
<b>Title of Proposal:</b>	<b>Chautauqua County Housing Market Assessment and Development Strategy</b>

Any proposals, or unsolicited amendments to proposals, received after the due date and time specified on the cover page may not be considered in the review process. No faxed or emailed documents will be accepted. CCPEG takes no responsibility for any third party error in the delivery of the applications (e.g., U.S. Post Office, Federal Express, UPS, courier, etc.).

Copies of proposals shall be available in a Microsoft Word or PDF document by e-mail after all proposals have been opened and awarded.

- 2.1** No proposal will be considered which is not accompanied by pricing information for services to be rendered, and all proposals shall be signed by an authorized individual.
  
- 2.2** Confidential, trade secret or proprietary materials as defined by the laws of the State of New York must be clearly marked and identified as such upon submission. Proposers intending to seek an exemption from disclosure of these materials under the Freedom of Information Law (NYS Public Officers Law, Sections 84-90) must request the exemption in writing, at the time of the submission of the materials, setting forth the reason for the claimed exemption. In addition, the proposer must mark each page of its submission on which there appears any material claimed to be protected as confidential or proprietary with the following legend, in bold face, capital letters at the top of each page: "THE PROPOSER BELIEVES THAT THIS INFORMATION IS PROTECTED FROM DISCLOSURE UNDER THE NEW YORK STATE FREEDOM OF INFORMATION LAW". Acceptance of the claimed materials does not constitute a determination on the exemption request, which determination will be made in accordance with statutory procedures.



### **SECTION 3: MODIFICATIONS OR WITHDRAWAL OF PROPOSAL:**

- 3.1 Questions about or requests for clarification of an item for this RFP must be submitted in writing to Rebecca Wurster, Planning Coordinator at wursterr@chqgov.com. Questions must be submitted prior than the date on the front of this solicitation. CCPEG responses will be submitted to all parties in the form of an Addendum to the original RFP, receipt of which must be acknowledged with each proposal submittal.
- 3.2 **Other than the contact person identified in the proposal, or their designee, prospective proposers shall not approach CCPEG employees or associated organizations during the period of this RFP process about any matters related to this RFP or any proposals submitted pursuant thereto.**
- 3.3 A proposal that is in the possession of CCPEG may be altered by a sealed letter bearing the signature or name of the authorized person, provided it is received PRIOR to the date and time of the proposal due date. Fax, email, telephone or verbal alterations will not be accepted. A proposal that is in the possession of CCPEG may be withdrawn by the proposer up to the time of the proposal due date. Failure of the successful proposer to furnish the service awarded, as a result of this Request for Proposal, may eliminate the proposer from the active vendors list for a period of time as determined by the Manager.

### **SECTION 4: EVALUATION CRITERIA:**

- 4.1 CCPEG reserves the right to seek any clarifications needed to determine the most qualified submittal and/or require correction of arithmetic or other apparent errors for the purpose of assuring a full and complete understanding of a proposer's proposal and/or to determine compliance with the requirements of the solicitation.
- 4.2 **Alternatives/Value-Added Considerations:** The Proposer may include items not specified in this RFP in their proposal in which the vendor feels can be pertinent to or an added benefit to the services requested. All such alternatives must be listed separately from the proposal and the cost thereof must be separated and itemized.
- 4.3 A contract may be awarded to the proposer whose proposal achieves the highest evaluation score by the evaluation committee based on the specified criteria, and not solely on the basis of price.
- 4.4 Unless otherwise specified in the solicitation, every offer is firm and not revocable for a period of sixty (60) days from the due date of the proposals.
- 4.5 Evaluation will be performed to determine the proposers understanding of work to be





performed, technical approach, potential for completing the work as specified herein, cost reasonableness, the probable cost to CCPEG, and ranking with competing proposers.

## **SECTION 5: PROPOSAL FORMAT AND SUBMITTALS:**

- 5.1 CCPEG requests that the following format be followed when submitting your proposal:
- ✓ **The title page:** RFP Subject, name of proposer, address, telephone, email address, contact person and table of contents.
  - ✓ **Qualifications:** List of qualifications and experience to carry out the requested services. Qualification to do business in NYS, number of years in business and length of experience. Limit this to two (2) pages maximum.
  - ✓ **References:** Include at least two references from supervisors of previous projects. Provide a list of municipal clients whom you have had past projects with that are of similar size and quality.
  - ✓ **Plan Implementation:** This is the scope of services in terms of the proposer's plan to carry out the requested services. Limit of a total of 6 pages maximum.
  - ✓ **Cost Proposal Section:** This shall include **all costs** associated with the proposer's plan to carry out the requested services as specified. Any cost proposal forms furnished by CCPEG must be included in this section. Alternatives must be separated and itemized.
  - ✓ **Mandatory Documents:** Please use the Response Checklist when submitting your proposal.
  - ✓ **Page Limit:** The combined technical approach, qualifications, experience, and references sections of the proposal is limited to 20 pages.

## **SECTION 6: PREPARATION OF PROPOSAL**

- 6.1 In case of error in the extension of prices in the proposal, unit prices will govern, where applicable.
- 6.2 Proposers are expected to examine special provisions, the scope of work, schedules and instructions included in this Request. Failure to do so will be at the proposer's risk
- 6.3 CCPEG will not reimburse proposers for any costs associated with the preparation and submittal of any proposal, or for any travel and/or per diem costs that are incurred.

## **SECTION 7: PROPOSER QUALIFICATIONS:**

- 7.1 Each proposer shall submit a statement of the proposer's qualifications, experience, organization, equipment, and facilities available to adequately provide the service and material necessary to fulfill the minimum specifications for this RFP, unless otherwise specified in the scope of work.



- 7.2 CCPEG shall have the right to take such steps as it deems necessary to determine the ability of the proposer to perform obligations under the contract, and the proposer shall furnish to CCPEG all such information and data for this purpose as may be requested.

#### **SECTION 8: AWARD AND CONTRACT INFORMATION:**

- 8.1 The proposer agrees that should their firm be awarded a contract, proposer will not discriminate against any person who performs work hereunder because of age, race, color, sex, creed, sexual orientation, national origin, or disability.
- 8.2 The proposer expressly warrants to CCPEG that it has the ability and expertise to perform its responsibilities hereunder and in so doing shall use the highest standards of professional workmanship.
- 8.3 CCPEG reserves the right to reject any or all proposals, to waive any informality or technical defect in the proposals, or to award the contract in whole or in part, if deemed to be in the best interest of CCPEG to do so. Explanations of CCPEG decisions shall not be required except as otherwise provided by law.
- 8.4 The successful proposer will be required to enter into and sign an Agreement or an Agreement of Services (Contract) with CCPEG with reasonable adjustments acceptable to CCPEG. This RFP and the response of the successful proposer may become a part of the Contract and will be in effect for the duration of the contract. The Contract language will control over any conflicting language contained within this RFP.
- 8.5 The successful proposer will not commence any work, which could be billed, until a valid Contract has been executed by both the proposer and CCPEG.

#### **SECTION 9: CONTRACT TERM:**

- 1 **Contract Term:** CCPEG intends to enter into a (1) year contract with the awarded Consultant.



**CCPEG**

**RESPONSE CHECKLIST - PROPOSAL NO. RFP-1-22 PLAN**

Please note below a list of documents which must be submitted in full as part of this proposal. Failure to submit any of the documents as part of your proposal or failure to acknowledge any addendum in writing with your proposal may be cause for rejection of the proposal.

Submitting a proposal on any condition, limitation or provision not officially invited in this RFP (Request for Proposal) may also be cause for rejection.

**Please check each item indicating your compliance:**

THIS CHECKLIST MUST BE SUBMITTED AS PART OF YOUR PROPOSAL:

- \_\_\_ RESPONSE CHECKLIST
- \_\_\_ NON-COLLUSION CERTIFICATE
- \_\_\_ IRANIAN DIVESTMENT CERTIFICATE
- \_\_\_ FINANCIAL AFFIDAVIT
- \_\_\_ AFFIDAVIT OF A FOREIGN CORPORATION
- \_\_\_ CORPORATE ACKNOWLEDGEMENT CERTIFICATE
- \_\_\_ EXCLUSION CHECK
- \_\_\_ PRICING SUBMISSION SHEET (PROPOSAL FORM) IF INCLUDED OR VENDOR'S OWN SUBMISSION
- \_\_\_ REQUIRED FORMS AS LISTED IN RFP
- \_\_\_ ADDENDUM(S) ACKNOWLEDGE (IF APPLICABLE)
- \_\_\_ ONE (1) ORIGINAL AND ONE (1) COPY OF YOUR SUBMITTED PROPOSAL
- \_\_\_ INSURANCE CERTIFICATES

COMPANY	TELEPHONE NUMBER
ADDRESS	EMAIL ADDRESS
AUTHORIZED REPRESENTATIVE (PRINT)	TITLE
AUTHORIZED SIGNATURE	DATE



**PROPOSAL RESPONSE FORM**  
**Proposal No. RFP-1-22 PLAN**

**Proposal Title: Chautauqua County Housing Market Assessment and Development Strategy**

**VENDOR NAME:** \_\_\_\_\_

**COMPANY:** \_\_\_\_\_

**REPRESENTATIVE:** \_\_\_\_\_

**EMAIL:** \_\_\_\_\_ **/PH.** \_\_\_\_\_

Below are two options, please indicate which one is applicable to your response and return to the contact below:

- We the above referenced Company will be preparing a proposal to submit for this project. I am returning this document to assure that I receive all further communication regarding the RFP including any addendums issued.
- We the above referenced Company will not be preparing a proposal to submit for this project for the following reasons listed below.

**Please check where applicable:**

\_\_\_\_\_ Project or scope not suited to our Company.

\_\_\_\_\_ Our items and/or materials do not meet your specifications.

\_\_\_\_\_ Insurance Requirements

\_\_\_\_\_ Bond Requirements too restrictive (when required)

\_\_\_\_\_ Scope is not clearly understood or applicable \_\_\_\_\_ too vague \_\_\_\_\_ too rigid

\_\_\_\_\_ Insufficient time allowed for preparation of proposal

\_\_\_\_\_ Other reason not listed above (or) elaborate on the checked marked reason above:

\_\_\_\_\_

\_\_\_\_\_

**Please send your response to: Nathan Aldrich, Manager**

Phone: 716-363-3672

Email: [aldrichn@chqgov.com](mailto:aldrichn@chqgov.com)

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Chautauqua Region Economic Development Corporation

201 W Third Street, Suite 115  
Jamestown, NY 14701-6902

Phone: 716-661-8900  
Fax: 716-450-4515