

Request for Proposal

*Oswego County Housing Market Assessment and Development Strategy
County of Oswego Industrial Development Agency*

PROPOSAL NO: RFP-5-24 PLAN

NAME OF RFP: Oswego County Housing Market Assessment and Development Strategy

- PROPOSAL ISSUE DATE: May 23, 2024
- QUESTIONS DUE BY: June 7, 2024
- PROPOSAL DUE DATE: June 21, 2024
- TIME: 3:30 PM

All proposals & questions should be mailed to:

ATTN: Nathan Emmons

Economic Development Coordinator, County of Oswego Industrial Development Agency

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Objective

The County of Oswego Industrial Development Agency (COIDA) is soliciting proposals from qualified firms to undertake an assessment of the housing market and a housing development strategy in Oswego County. 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

Oswego County is located just west and north of Syracuse in New York State and has a population of approximately 117,000 people. It is comprised of two cities, 10 villages and 22 towns across 968 square miles of land. According to the U.S. Census Bureau, Oswego County has a total of 54,470 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 of economic development in the region including the MICRON development in neighboring Onondaga County resulting in massive new job creation and a corresponding increase in population. This economic expansion will drive a growing need for a wide range of housing choices to accommodate the expanding workforce, spanning from affordable workforce and market-rate rentals to single-family homes, considering the income levels of the current population and potential new employees.

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 three 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; recommend strategies to address gaps; identify specific potential new housing development locations; identify challenges to future housing locations such as infrastructure needs, code/zoning laws; and any future trends that could impact housing needs. The third phase will address potential incentives, financing needs, state funding programs and actions to remove regulatory barriers that may impact future housing growth. The project design must incorporate a regional perspective when addressing various aspects of the housing study. This approach should not only focus on specific municipalities within the county but also consider broader regions within Oswego County.

Scope Of Work

Project Kickoff

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

Oswego County Housing Market Conditions

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. Data collection, analysis and reporting should consider the varying housing market from community to community within the county. Identify impacts on alternative forms of housing such as short-term rentals (i.e. AIRBNB), accessory dwelling units, other forms of housing. Analysis should also include a discussion about AMI and how it fits into the broader housing picture, as well as how the placement and scale of non-market rate housing units would influence market-rate efforts.

Tactical Direction for Oswego County's Housing Market Needs

Estimate the demand for various housing types and determine a focused investment strategy (FIS) considering community goals (downtown revitalization, neighborhood preservation, talent attraction, housing equity, etc.) and the barriers-largely financial, which keep them from being realized. Suggest strategies for incentivizing housing stabilization, rehabilitation, preservation.

Oswego County Housing Market Strategies & Action Plan

Identify mechanisms 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, use of regional banks, zoning/code/land use updates, state and local incentives. Define the environment and incentives that attract developers and responsible, community-based investment. 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 Oswego County while preventing gentrification of neighborhoods or communities.

Implementation, Funding, Monitoring, and Progress Evaluation

Develop a matrix and prioritize the above strategies and an action plan to move forward with implementation including a list of funding opportunities that are applicable to each recommendation. Tools should be identified to measure and report progress towards meeting the goals and objectives included within the study.

Final Deliverable

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

Print copies of the final document are to be delivered to COIDA, as well as a digital pdf version and any other relevant documents prepared during the project process.

Project Timeline

This project should be able to be completed within a 6-8-month timeframe. Consideration will be given to proposals that require longer than the allotted timeframe. (Any proposals that indicate a need for longer time than specified timeline should include rationale as to why along with any impacts on proposed costs).

Proposal Contents

Each proposal shall be prepared simply and economically, avoiding the use of elaborate promotional materials beyond what is sufficient to provide a complete, accurate and reliable presentation. Proposer shall, at a minimum, include the following in their proposal:

Experience and Qualifications

The proposer should describe relevant experience, specifically as pertains to housing, data collection/analyzation, and data mapping. Work on prior research studies and similar engagements should be described in detail.

Project Team

The proposal shall list all individuals who will work on the project and include resumes for all. Clearly identify the Project Manager for this engagement.

Price

Include budget breakdown of hard and soft costs associated with project. Hourly rates should be included per task.

Project Approach/Design

Provide a thorough description of the approach to this project. Include timeframe of project components such as research and data collection, mapping, recommendations, and final report preparation. Include anticipated deliverables.

Evaluation Criteria

A committee will review and score the proposal against the following criteria. Note – the criteria are not necessarily listed in order of importance.

- ***Experience of propose in performing similar engagements.***
- ***Evaluation of the proposer's fee submission. It should be noted that while price is not the only consideration, it is an important one.***
- ***Staff capacity***
- ***Quality of proposal relative to style, comprehensiveness, and content***
- ***A determination that the proposer has submitted a complete and responsive proposal as required by this RFP.***
- ***An evaluation of the proposer's projected approach and plans to meet the requirements of this RFP.***
- ***Performance at interview (if required).***

**The above selection criteria are provided to assist proposers and are not meant to limit other considerations which may become apparent during the course of the selection process.*

Understandings

Please take notice, by submission of a proposal in response to this request for proposals, the proposer agrees to and understands: that any proposal, attachments, additional information, etc. submitted pursuant to this Request for Proposals constitute merely a suggestion to negotiate with COIDA: submission of a proposal, attachments and additional information shall not entitle the proposer to enter into an agreement with COIDA for the required services; by submitting a proposal, the proposer agrees and understands that COIDA is not obligated to respond to the proposal nor is it legally bound in any manner whatsoever by submission of same; that any and all counter-proposals, negotiations or any communications received by a proposing entity, its officers, employees or agents from the COIDA, its officers, employees or agents shall not be binding against the COIDA, its officers, employees or agents unless and until a formal written agreement for the services sought by this RFP is duly executed by both parties.

In addition to the foregoing, by submitting a proposal, the proposer also understands and agrees that COIDA reserves the right, and may at its sole discretion, exercise the following rights and options with respect to this Request for Proposals:

- To reject any or all proposals.
- To issue amendments to this RFP.
- To issue additional solicitations for proposals.
- To waive any irregularities in proposals received after notification to proposers affected.
- To select any proposal as the basis for negotiations of a contract, and to negotiate with one or more of the proposers for amendments or other modifications to their proposals.
- To conduct investigations with respect to the qualifications of each proposer.
- To exercise its discretion and apply its judgment with respect to any aspect of this RFP, the evaluation of proposals and the negotiations and award of any contract.
- To enter into an agreement for only portions (or not to enter into an agreement for any) of the services contemplated by the proposals with one or more of the proposers.
- To select the proposal that best satisfies the interests of COIDA and not necessarily based on price or any other single factor.
- To interview the proposer(s).
- To request or obtain additional information COIDA deems necessary to determine the ability of the proposer.
- To modify dates.

All proposals prepared in response to this RFP are at the sole expense of the proposer and with the express understanding that there will be no claim whatsoever for reimbursement from COIDA for the expenses of preparation. COIDA assumes no responsibility or liability of any kind for costs incurred in the preparation or submission of any proposal.

While this is an RFP and not a bid, the COIDA reserves the right to apply the case law under General Municipal Law § 103 regarding bidder responsibility in determining whether a proposer is a responsible vendor for the purpose of this RFP process.

COIDA is not responsible for any internal or external delivery delays which may cause any proposal to arrive beyond the stated deadline. To be considered, proposals MUST arrive at the place specified herein and be time stamped prior to the deadline.

Contract

After selection of the successful proposer, a formal written contract will be prepared by the COIDA and will not be binding until signed by both parties and, if necessary, approved by the Oswego County Legislature. The term of the contract shall be for a one (1) year period commencing upon contract execution by both parties. COIDA, in its sole discretion, may extend the agreement beyond its initial term for up to one (1) additional 1-year period at the same prices and conditions.

Indemnification & Insurance

The proposer accepts and agrees that language in substantially the following form will be included in the contract between the proposer and COIDA:

“In addition to, and not in limitation of the insurance requirements contained herein the Consultant agrees: that except for the amount, if any, of damage contributed to, caused by or resulting from the negligence of the County of Oswego Industrial Development Agency, the Consultant shall indemnify and hold harmless the County of Oswego Industrial Development Agency, its officers, employees and agents from and against any and all liability, damage, claims, demands, costs, judgments, fees, attorneys' fees or loss arising directly or indirectly out of the acts or omissions hereunder by the Consultant or third parties under the direction or control of the Consultant; and to provide defense for and defend, at its sole expense, any and all claims, demands or causes of action directly or indirectly arising out of this Agreement and to bear all other costs and expenses related thereto.”

Upon execution of any contract between the proposer and the COIDA, the proposer will be required to provide proof of the insurance coverage.

Intellectual Property Rights

The proposer accepts and agrees that language in substantially the following form will be included in the contract between the proposer and the COIDA:

“All deliverables created under this Agreement by the Consultant are to be considered “works made for hire”. If any of the deliverables do not qualify as “works made for hire”, the Consultant hereby assigns to the County of Oswego Industrial Development Agency all right, title and interest (including ownership of copyright) in such deliverables and such assignment allows the County of Oswego Industrial Development Agency to obtain in its name copyrights, registrations and similar protections which may be available. The Consultant agrees to assist the County of Oswego Industrial Development Agency, if required, in perfecting these rights. The Consultant shall provide the County of Oswego Industrial Development Agency with at least one copy of each deliverable.

The Consultant agrees to indemnify and hold harmless the County of Oswego Industrial Development Agency for all damages, liabilities, losses and expenses arising out of any claim that a deliverable infringes upon an intellectual property right of a third party. If such a claim is made, or appears likely to be made, the Consultant agrees to enable the County of Oswego Industrial Development Agency's continued use of the deliverable, or to modify or replace it. If the County of Oswego Industrial Development Agency determines that none of these alternatives is reasonably available, the deliverable will be returned.

All records compiled by the Consultant in completing the work described in this Agreement, including but not limited to written reports, source codes, studies, drawings, blueprints, negatives of photographs, computer printouts, graphs, charts, plans, specifications, and all other similar recorded data, shall become and remain the property of the County of Oswego Industrial Development Agency. The Consultant may retain copies of such records for its own use."

Non-Collusion

The proposer, by signing the proposal, does hereby warrant and represent that any ensuing agreement has not been solicited, secured or prepared directly or indirectly, in a manner contrary to the laws of the State of New York and the County of Oswego, and that said laws have not been violated and shall not be violated as they relate to the procurement or the performance of the agreement by any conduct, including the paying or the giving of any fee, commission, compensation, gift, gratuity or consideration of any kind, directly or indirectly, to any COIDA employee, agent, officer or official.

Conflict of Interest

All proposers must disclose with their proposals the name of any officer, director or agent who is also an employee of COIDA or the County of Oswego. Further, all proposers must disclose the name of any County or COIDA employee who owns, directly or indirectly, an interest of ten percent or more in the firm or any of its subsidiaries or affiliates.

There shall be no conflicts in existence during the term of any contract with COIDA. The existence of a conflict shall be grounds for termination of a contract.

Compliance With Laws

By submitting a proposal, the proposer represents and warrants that it is familiar with all federal, state and local laws and regulations and will conform to said laws and regulations. The preparation of proposals, selection of proposers and the award of contracts are subject to provisions of all Federal, State and County laws, rules and regulations.