

Request for Qualifications:

Building the Southern Tier's Capital Stack for Workforce Housing

Regional Workforce Housing Investment Framework

**RESPONSES DUE BY
THURSDAY, JANUARY 8TH, 2026 AT 4:00 PM**



49 Court Street, Suite 222
Binghamton, NY 13901



Introduction

The Southern Tier 8 (ST8) Regional Board was established in 1968 as a special purpose local government unit under Articles 5G and 12B of New York State's General Municipal Law. It operates under authority by joint resolution of the legislative bodies of our member counties: Broome, Chenango, Cortland, Delaware, Otsego, Schoharie, Tioga, and Tompkins. The board is comprised of representatives from both the public and private sectors.

This project is funded through a grant from the Appalachian Regional Commission (ARC) and local county partners, building on past investments to support coordinated housing and strategic planning efforts across the region.

Project Purpose

Southern Tier 8 Regional Board is seeking a qualified and innovative firm or group of firms to support development of a comprehensive Regional Workforce Housing Investment Framework per the scope described below. This framework will guide future investments by identifying scalable solutions to align housing supply with regional community and workforce demand and unlock public-private reinvestment.

While the project scope outlined below reflects the full vision for the Regional Workforce Housing Investment Framework, the initial funding available (\$200,000) may not cover all components. ST8 seeks a partner who can advise on how best to prioritize, sequence, and implement the scope in a manner that ensures immediate impact and informs potential next steps for broader implementation.

Project Background

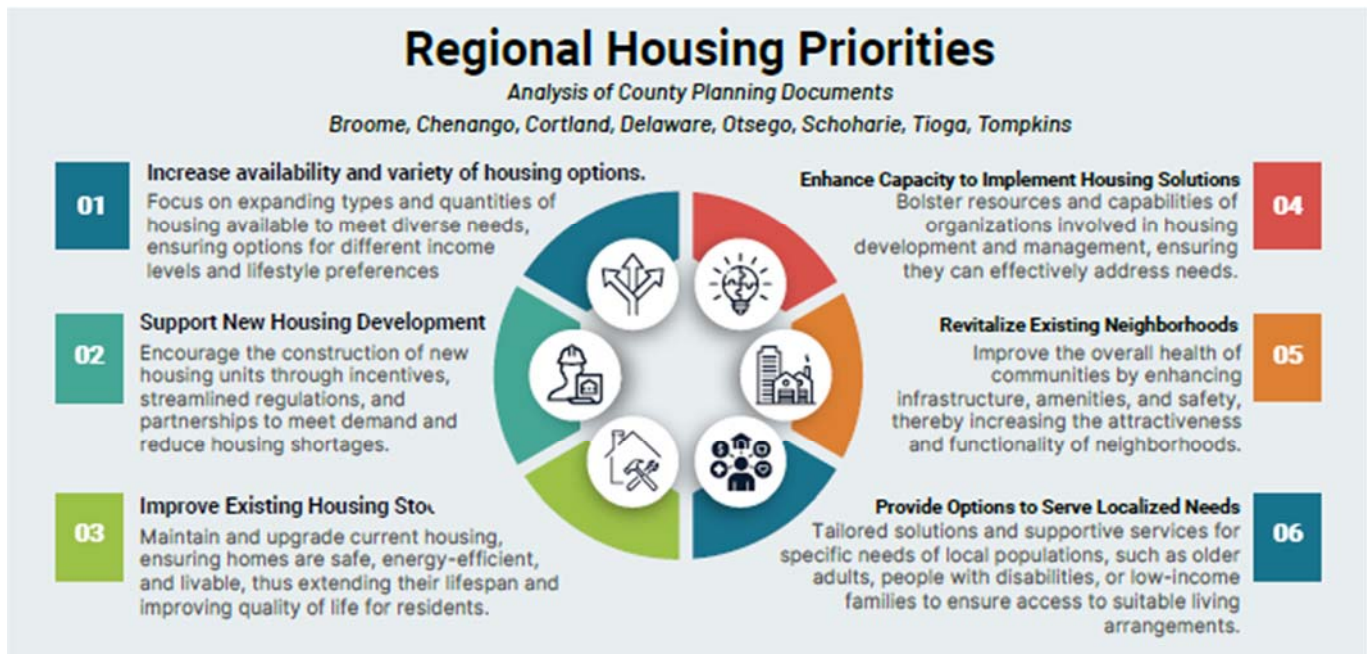
The Southern Tier 8 region of New York State includes the counties of Broome, Chenango, Cortland, Delaware, Otsego, Schoharie, Tioga, and Tompkins. This region covers a diverse mix of communities, including cities such as Binghamton, Ithaca, and Oneonta, along with many small towns and rural municipalities spread across a broad geographic area. The population is varied, representing a range of economic backgrounds and community needs.

The region's economy is anchored by a diverse blend of key and emerging industries, including manufacturing, agriculture and food processing, healthcare, education, utilities, and retail. These sectors are evolving, creating opportunities for growth and workforce development. Despite generally affordable price points, the region's housing stock has remained stagnant due to low rates of new construction, declining quality, and an inventory that is increasingly outdated for modern needs, especially for households in middle income ranges. Limited availability of quality housing, compounded by the unfavorable construction environment, directly constrains the region's ability to capitalize on these economic opportunities as employers struggle to attract and retain workers, and potential new investments are hindered by the lack of suitable housing options for the local workforce. While national data shows housing starts to be growing in small metros and outlying areas such as in our region, and shrinking in larger metros, our area lacks a comprehensive strategy to draw our share of these investments.

For a more in-depth view of localized housing conditions across the region, Southern Tier 8 reviewed strategic plans and housing assessments as available for all eight counties and conducted a high-level review of these county plans, comparing findings to regional data and analyzing local housing goals and priorities. This process identified shared needs and opportunities for regional collaboration, revealing six regional housing priorities:

1. Increase availability and variety of housing options.
2. Support new housing development.
3. Improve existing housing stock.

4. Enhance capacity to implement housing solutions.
5. Revitalize existing neighborhoods.
6. Provide options to serve localized needs.



These priorities reflect a deeper understanding of housing as a critical component of the region's economic infrastructure, essential for supporting workforce participation, community vitality, quality of life and long-term competitiveness.

We also identified five foundational pillars that ground the region's implementation approach. Each represents a critical area of support required to enable housing solutions at scale and expand development capacity:

- Pillar 1: Investment - Driving Capital to Workforce Housing Development
- Pillar 2: Capacity Expansion - Strengthening Local Leadership and Development Ecosystem
- Pillar 3: Community Collaboration - Coordinating Regional Action
- Pillar 4: Infrastructure and Growth Opportunity Alignment - Connecting Housing and Infrastructure Investment
- Pillar 5: Regional Value Proposition - Positioning the Southern Tier as an Investment Destination

In response to these challenges, ST8 is advancing this framework to transition the region from a cycle of disinvestment to a cycle of reinvestment. This project represents the next step in operationalizing that vision through a focused investment framework that aligns data, capacity, and capital.

The ST8 region is aiming to leverage these opportunities for growth by establishing a Community Coalition and Investment Framework focused on increasing workforce housing and infrastructure investment. The Southern Tier Regional Workforce Housing Investment Framework will provide a coordinated structure for pooling smaller, fragmented rural resources into larger, impactful, and scalable projects that attract both public and private investment.

More details can be found here: <https://southerntier8.org/economic-development-programs/southern-tier-s-capital-stack-for-workforce-housing>

Project Scope

This project is supported by grant funding from the Appalachian Regional Commission, leveraging substantial in-kind contributions from the eight County Planning Departments. Each county will provide local representation, technical support, housing and land use expertise, and project development assistance to ensure the regional framework is informed by local knowledge and integrated across jurisdictions.

The selected consultant or team of consultants will work with ST8 and the eight counties to develop and operationalize the Southern Tier Regional Workforce Housing Investment Framework. The framework is designed to guide regional housing and investment priorities and will assist with refinement and implementation planning. The consultant will assist ST8 with implementing and operationalizing the framework by refining its structure, validating assumptions, and guiding its regional rollout. ST8 seeks a partner who can bring complementary expertise and external perspective to ensure establishment of an investment framework that is practical, data-informed, and positioned to attract investment and drive implementation.

The following scope of work outlines the proposed structure and deliverables for this project. However, we recognize that the success of this effort depends on tailoring the approach to best meet the needs of the community as identified. We welcome and encourage the selected consultant(s) to work with us to refine, adapt, and expand upon this framework based on experience and expertise working with municipalities and/or workforce partners and are seeking expert advice on how to implement, prioritize, and adapt this work within available resources while positioning the region for larger-scale, long-term implementation.

In their response, consultants should provide recommendations on which elements of this work are most feasible and high-impact given the available budget, and propose strategies for phasing or scaling the remainder in subsequent steps if applicable.

Scope:

This initiative will include the following components, setting the stage for implementation of the Southern Tier Regional Workforce Housing Investment Fund Initiative under the above-referenced pillars:

I. Market/Needs Summary: Foundation for Coordinated Investment

This component focuses on gathering the essential data to understand the region's current housing needs and opportunities, providing the critical foundation to guide the implementation phase. This data-driven approach ensures that strategies are tailored to the region's unique needs and align with state and federal priorities. The analysis will directly inform decisions on regional investment structures, driving collaborative, sustainable housing solutions across counties. While high level analysis has been conducted by Southern Tier 8, a more targeted analysis/summary from experts with broader experience and access to more extensive data will help us to fine-tune the framework and implementation strategy, ensuring long-term effectiveness. By benchmarking against similar markets and communities that have successfully scaled workforce housing solutions, we can identify proven strategies, adapt best practices, and position the region to compete for investment on a larger scale.

The Analysis will include the following components:

A. Regional Housing Market/Needs

- **Regional Housing Market and Needs Summary:** Analyze the current housing data to identify critical needs and areas for targeted intervention, directly informing the framework's established financing mechanisms. Include comparison to similar and neighboring markets.
- **Demographic and Population Migration Analysis:** Evaluate population trends and migration patterns to highlight regions of focus and support effective resource allocation.

B. Priority Development Area and Infrastructure Analysis

- **Desktop Analysis of Development Areas:** Identify key areas for housing development based on available data and regional growth potential, guiding collaborative investment and evaluate high level policy needs for implementation.
- **Priority Infrastructure Enhancement:** Analyze infrastructure needs in priority areas to guide investments that will unlock new housing opportunities and ensure infrastructure readiness. Prioritize identified projects for investment to be integrated into a project portfolio.

C. Regional Capacity Analysis

- **Housing Partner and Implementation Capacity Assessment:** Southern Tier 8 developed a map of stakeholder groups to provide a picture of the various sectors involved in housing development ecosystem (see attachment). Evaluate the ability of local stakeholders to support housing development, pinpointing gaps in capacity, opportunities to build on success, and ensuring regional solutions are scalable and sustainable.
- **Value Chain Assessment:** Utilizing the Value Chain Assessment framework (see attachment), identify targeted interventions for modernization of the housing stock, accelerating housing construction and revitalization through innovative, targeted interventions addressing the cost of land, labor, materials, and infrastructure. Pinpoint where cost-saving strategies, policy change, and integration of emerging housing construction materials and methodologies can be applied to reduce development costs, enhance feasibility, and increase scalability, while aligning with workforce needs. The goal is to drive efficient, high-impact housing solutions that expand regional housing capacity and address existing gaps in workforce housing options.

II. Partnership Strategy: Translating Analysis into Collaborative Action

The partnership strategy component translates the analysis into actionable steps for regional collaboration, investment, and housing development. It creates a structured framework for cooperation, ensuring the Southern Tier leverages public and private resources to expand and accelerate proven housing solutions. The regional strategy ensures coordination, prevents duplication, and supports resource sharing, enabling larger-scale investments and synergies across counties. In this way, localized investments are supported and guided by the regional framework, enhancing their effectiveness while contributing to a larger, coordinated effort to tackle housing and economic development challenges.

The Partnership Strategy will consist of the following components:

A. Regional Workforce Housing Investment Fund Framework

A central component of the strategy is the Regional Workforce Housing Investment Fund, designed to provide flexible, sustainable financial resources to support housing development across the Southern Tier. If deemed feasible, the fund will play a pivotal role in aligning regional investments and catalyzing high impact housing projects. The fund will serve as a key vehicle for structuring a capital stack, ensuring that housing projects can access the right mix of funding sources to enhance feasibility and financial sustainability. It will create a scalable and replicable model for financing workforce housing, blending public and private resources to reduce risk, increase investment capacity, and drive long-term housing stability in the region. This will include evaluation of options for the following:

- Feasibility of options for establishment of a Regional Investment Fund.
- Governance and Oversight including representation from local officials and stakeholders across the housing development ecosystem.

- Fundraising and Capitalization, building the capital stack, including federal and state housing grants, local government contributions, private-sector investments, and philanthropic organizations, with a focus on establishing flexible and sustainable sources of funding for investment.
- Investment Mechanisms such as low-interest loans, equity investments, grants, and tax credits depending on project needs. These tools will be structured to leverage private investment and facilitate co-investment opportunities for larger-scale development.
- Project Selection Criteria to ensure alignment with regional goals
- Performance Monitoring and Accountability including key performance indicators to track the success of funded projects.
- Legal and Regulatory Considerations for implementation
- Implementation Roadmap to outline milestones and benchmarks to monitor progress, aligning housing development outcomes with workforce housing, innovation, and economic objectives.

B. Stakeholder Information and Engagement Strategy

A successful implementation strategy relies on designing tools for education, resources, and opportunities for dialogue. Develop a robust engagement and outreach plan for the project with the primary objectives of ensuring all stakeholders are knowledgeable about housing issues, resources and solutions specific to our region, equipping local officials with the tools and information needed for effective implementation of housing strategies, and building community support. Specific components of the strategy will include:

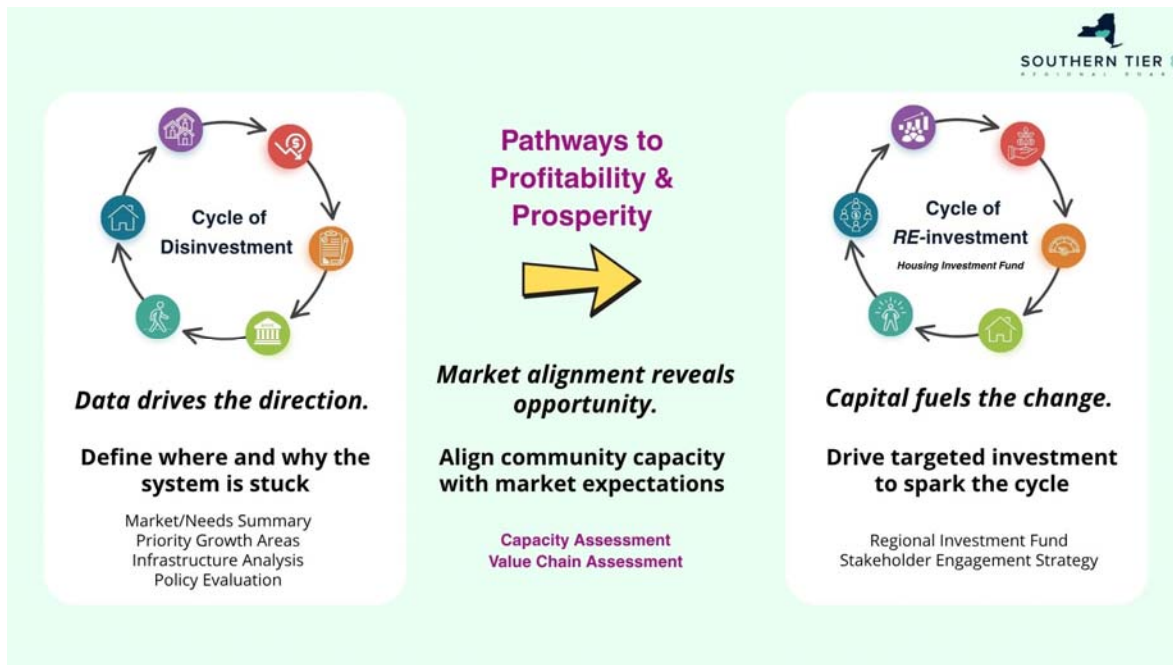
- Defining Target Audiences that may include local government officials, developers, non-profits, economic developers, financial institutions or other identified stakeholder groups.
- Define key program components that may include workshops/training, information/resources, educational collateral, stakeholder engagement tools, capacity building toolkits, technical assistance tools, and others.
- Monitoring and evaluation mechanisms
- Implementation steps for ongoing engagement and long-term sustainability.

C. Project Execution Deliverables:

Draft deliverables to ensure transition to project implementation as applicable based on the developed framework including a Memorandum of Agreement (MOA) formalizing partnerships, a funding proposal, and request(s) for proposals (RFP) for seed funding acquisition and implementation based on the strategies outlined in the investment framework. This approach ensures the transition from funding acquisition to implementation is seamless, enabling timely and efficient execution of the housing investment strategy while minimizing delays between funding approval and project initiation.

- **Memorandum of Agreement:** Outline the structure, governance, and commitments for a Housing Investment Fund. The MOA will formalize partnerships, define funding mechanisms, and set guidelines for project selection, ensuring a coordinated approach to scaling workforce housing investments across the region.
- **Funding proposal:** Develop of a funding proposal for seed funding targeting alignment with the investment framework. The proposal will include project narratives, budgets, timelines, and measurable outcomes, directly informed by the framework's priorities.
- **RFP Development:** Develop RFP(s) to solicit qualified entities or firms to partner on project implementation. This will be tailored to reflect the strategies, priorities, and objectives of the framework and outline the scope of work, deliverables, timelines, qualifications, and performance metrics aligned with the grant proposal, facilitating rapid project execution and maximizing the impact of the housing investment

We have outlined the intended approach for the full project scope in the following graphic:



Budget and Schedule

This project is supported by grant funding in the amount of \$200,000 from the Appalachian Regional Commission, leveraging substantial in-kind contributions from the eight County Planning Departments. Each county will provide local representation, technical support, housing and land use expertise, and project development assistance to ensure the regional framework is informed by local knowledge and integrated across jurisdictions. Work is expected to be completed within the grant term which expires on February 28, 2027.

Grant Compliance

This project is funded through a grant from the Appalachian Regional Commission through the Area Development Program.

- **Project Reporting:** The applicant will be required to provide project updates and information as requested by Southern Tier 8 and in compliance with the grant award between Southern Tier 8 Regional Board and ARC (generally every 120 days according to the schedule set by ARC).
- **Good Standing:** The recipient is authorized to do business and is in good standing in the State of New York.
- **Legal Compliance:** Recipient is in substantial compliance with all environmental, worker protection, and local, state and federal tax laws and acknowledges that to remain eligible for these state incentives, the Recipient must continue to be compliant with these laws.
- **Award Commitment:** It is expected the project will proceed as described and within the time frame set forth in the submitted response. Any material change to the project scope or timeline must be submitted to and approved by Southern Tier 8 prior to implementation.

Response Requirements

Organizations/Firms interested in responding to this RFQ should prepare and submit a response that includes:

- **Cover Letter:** The cover letter is to be signed by an officer of the organization/firm authorized to execute a contract with Southern Tier 8 Regional Planning Development Board. The cover letter should introduce your team and its intent to pursue the project.
- **Project Understanding:** Demonstrate an understanding of the project, issues and opportunities relevant to the subject matter and target audience, as well as expertise and past experience with similar programs.
- **Project Approach:** Describe your team’s approach to the scope of work outlined above, including your experience in advising on phased or budget-constrained projects, prioritizing initiatives, and guiding implementation of complex regional strategies. Respondents should note that ST8 intends to evaluate and negotiate the final scope of work as part of the interview and selection process, based on available funding and the team’s recommendations for high-impact, feasible approaches
- **Consultant Qualifications:** Include descriptions of comparable projects completed in areas similar to the Southern Tier, or similar in scope to the project as described. References for project examples should be listed and include contact name, title/affiliation, phone number and e-mail address. Emphasis should be on projects completed within the past five years, or projects with demonstration of implementation successes is preferred.
- **Staffing Plan:** Describe the experience and expertise of your project team, including resumes and qualifications of key individuals and their roles throughout the process. If applicable, subcontractors and their proposed portion of the scope of work should also be identified, and qualifications, contact information, and key personnel included in the response submission.
- **Acknowledgement of Grant Requirements:** Indicate in writing that the respondent understands the requirements as outlined in this request for qualifications and is prepared to meet these requirements. Provide a summary of how your firm is in compliance with the items listed under the “Grant Compliance” section above.
- **Project Schedule:** The selected organization/firm’s work schedule will begin immediately on contract award and is expected to continue until approval and acceptance of a completed plan. The project team should propose a schedule with project milestones in alignment with the scope of work and deliverables.
- **Estimated Project Fee:** The budget from the awarded grant is \$200,000. Consultants should provide recommendations on which elements of this work are most feasible and high-impact given the available budget, and propose strategies for phasing or scaling the remainder in subsequent steps if necessary.

Interviews

Interviews may be requested as part of the final selection process. Lead members and key personnel will be expected to attend any interviews scheduled.

Evaluation Criteria

Responses will be reviewed and evaluated based on the following criteria:

Criteria	Maximum Points
Quality and completeness of response	15
Understanding of and approach to project	25
Qualifications and relevant experience	20
Ability to complete tasks in a timely manner and within budget	15
Technical capabilities and resources	15
Knowledge of State and Federal Programs and funding sources	10

Deadline and Delivery

The response shall be submitted electronically to Southern Tier 8 via email prior to Thursday, January 8th, 2026 at 4:00 pm.

Submittals and questions should be directed to:

Project Contact: Beth Lucas, Regional Planning Director
Email: blucas@southerntier8.org
Phone: (607)727-4002
Address: Southern Tier 8 Regional Board
49 Court Street, Suite 222
Binghamton, NY 13901

Responses received after 4:00 p.m. on Thursday, January 8th 2026 will not be accepted.

Attachments

Please see all referenced graphics within the above document in the following pages, attached.

Housing Ecosystem Map

Cross-System Partners

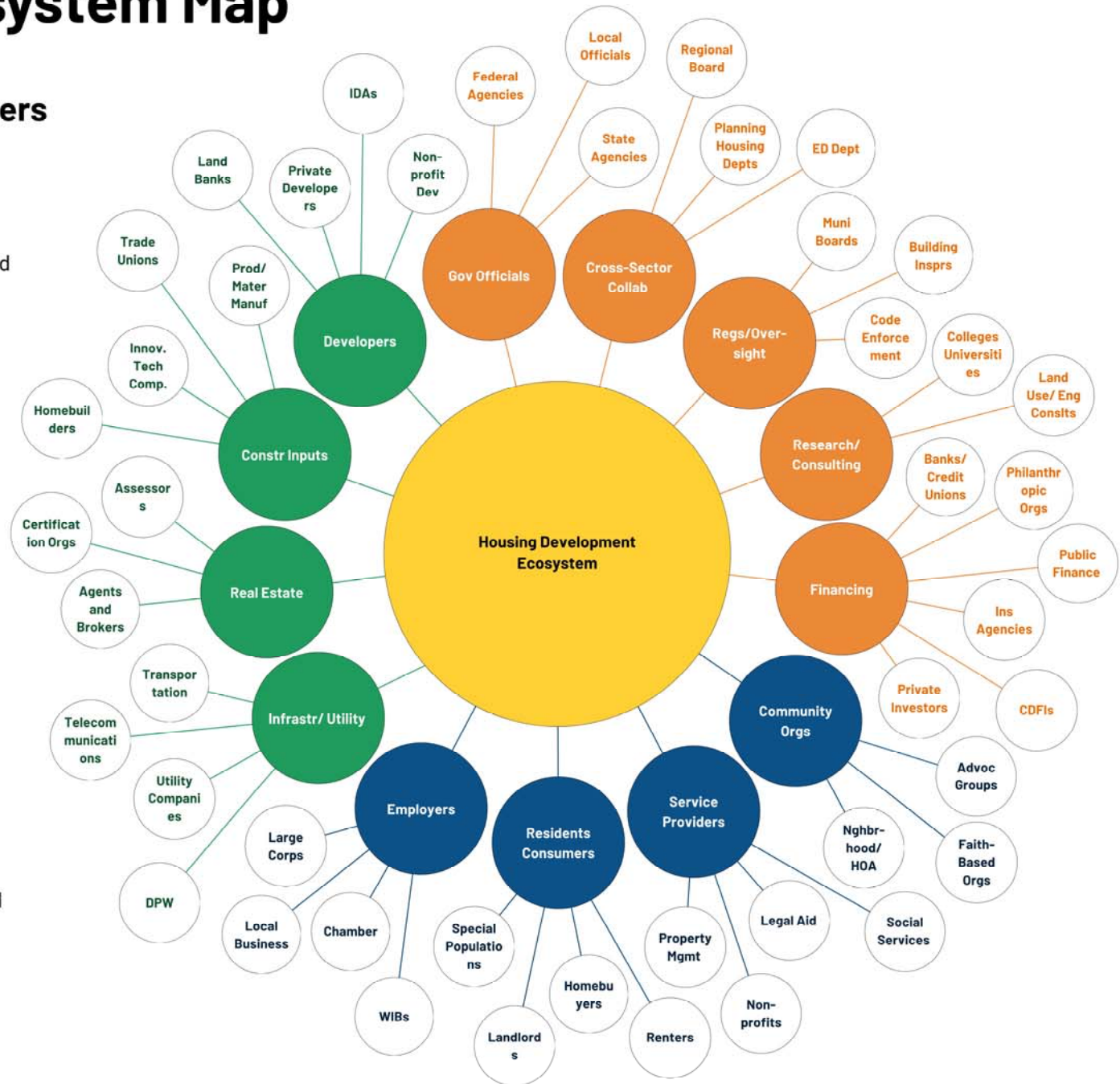
Work across both supply and demand systems to align investments, services, data, or strategies. Bridge gaps, support collaboration, and enable integrated approaches to housing and economic development.

Supply Partners

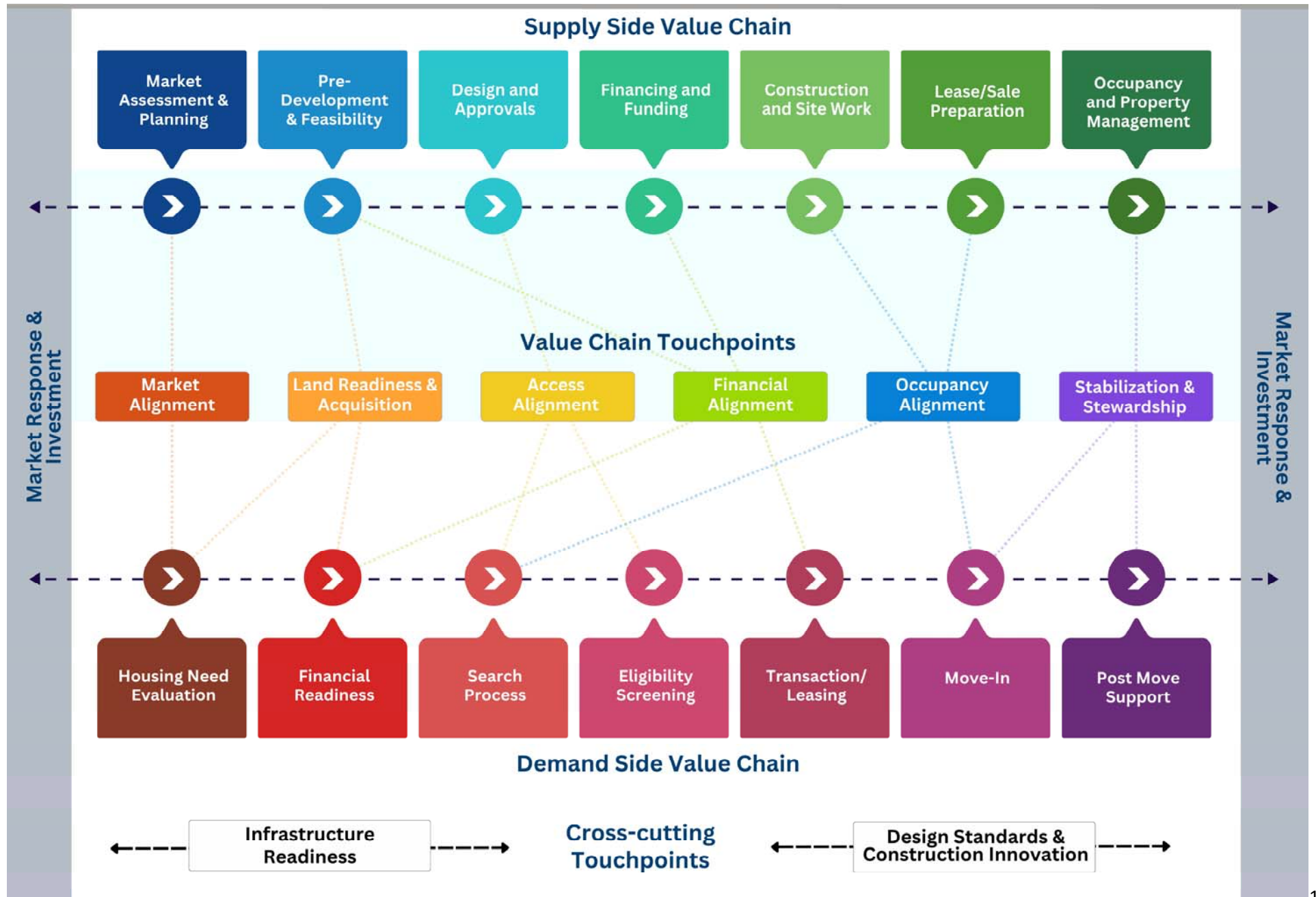
Create, fund, or deliver the physical housing units and related infrastructure. This includes builders, developers, landowners, and capital providers who shape housing production capacity.

Demand Partners

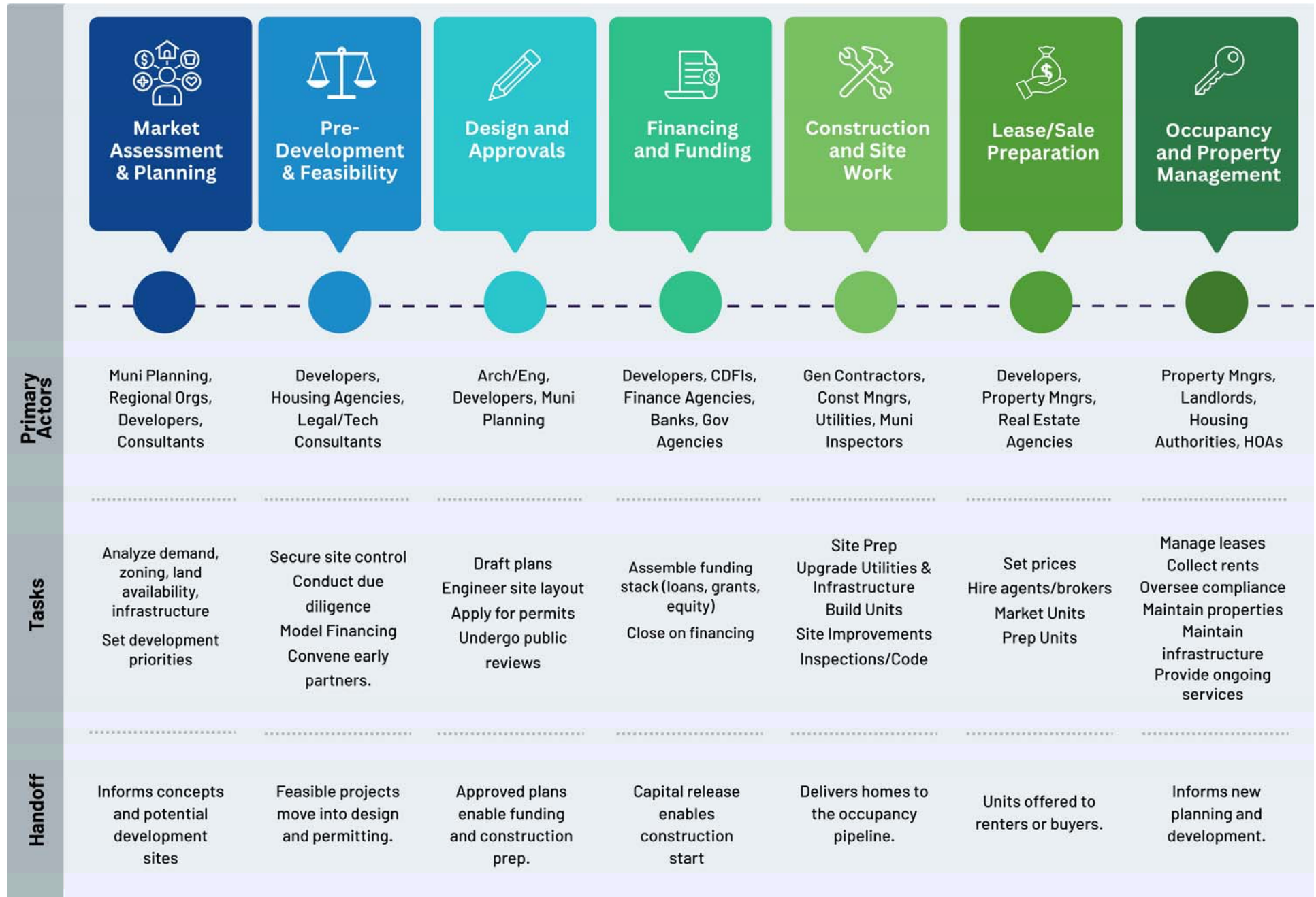
Need, seek, or advocate for access to housing. This includes residents, workers, employers, and others whose well-being and operations depend on housing availability and affordability.



Housing Development Value Chain



Supply Side Value Chain



Demand Side Value Chain

