

August 22, 2025

Request for proposals to provide professional consulting services to produce a

Catawba Regional Workforce Housing Study

Proposal due date:

Friday, September 19, 2025, 4:00 p.m. EDT

Issued by the Catawba Regional Council of Governments on behalf of communities
within the Catawba COG Region

Proposal delivery address and point of

contact: Elizabeth Morgan,

emorgan@catawabacog.org

RECEIPT LOCATION:

215 Hampton Street

P.O. Box 450

Rock Hill, South Carolina 29731

Background

After many discussions and meetings with local stakeholders, it was determined that it would be beneficial to the Catawba Region to solicit proposals for a regional study concerning the workforce housing market, including inventory, cost, and relationship to economic conditions and jobs in the four-county Catawba Regional Council of Governments (CRCOG) region.

Anchored by both urban centers and rural communities, the CRCOG region comprises four counties and 22 municipalities, and is diverse in its character and industries. Situated along the northern border of South Carolina, the region benefits from its strategic proximity to the Charlotte, NC metropolitan area, particularly the northern counties of York and Lancaster, which have seen rapid suburban growth and economic integration with the Charlotte economy. York County, home to cities such as Rock Hill and Fort Mill, is the most urbanized and populous part of the region, experiencing significant growth in both residential and commercial development. It is a hub for education, manufacturing, and technology. Lancaster County is also experiencing growth. The northern portion of the county—especially near the Indian Land and Panhandle areas—has undergone significant transformation over the past two decades, evolving into a suburban extension of Charlotte. In contrast, the southern half of the county retains a predominantly rural and agricultural character.

To the south and west, Chester and Union counties present a more rural and historically industrial character, with economic development centered around manufacturing, agriculture, and logistics. These counties are focusing on revitalization, infrastructure investment, and workforce development to enhance economic opportunities. Union County is part of the Spartanburg County Metropolitan Statistical Area (MSA) and commuting patterns trend to the Spartanburg and Greenville areas. The City of Union is the county seat and primary urban center, historically serving as a textile hub. Today, the city remains the focal point of government, healthcare, and education services in the county. Chester County's largest community is the City of Chester. Chester County has transitioned from a traditional textile-based economy to one driven by advanced manufacturing, distribution, renewable energy, and logistics, and has seen housing prices nearly double in the past five years.

The region features a range of geographic landscapes—from the foothills of the Piedmont to the rolling farmlands and river valleys that shape much of the area's natural beauty and historic character. Key natural and historic resources include the Catawba River, the Broad River, and Lake Wylie, which support regional recreation, water supply, and environmental conservation efforts. Historic sites include the downtown districts of Union and Chester counties, the Historic Brattonsville Farm in York County, and the historic courthouse in downtown Lancaster.

Transportation corridors, such as Interstate 77, U.S. Highways 176, 321, and 521, and South Carolina Highways 5, 49, and 72, connect the region to larger markets and provide critical infrastructure for both freight and commuter traffic. Proximity to major rail service and access to inland ports, as well as Charlotte Douglas International Airport, further enhance the region's connectivity.

For the purposes of this study, the market will be targeted at housing for working families with incomes ranging from 80% to 150% of the area median income (AMI). The American Community Survey (U.S. Census) identifies average area median incomes in each of the four counties of the Catawba Region (2019-2023). From these averages, the 80-150% of AMI income ranges by county are: Chester County: \$40,973 - \$76,824; Lancaster County: \$59,801 - \$112,126; Union County: \$32,960 - \$61,800; York County: \$66,448 - \$125,590.

This study will provide local jurisdictions with empirical data to make informed decisions on policy and planning for current and future workforce housing. This study will develop pathways for economic development by connecting employers seeking talent with job seekers, while providing attainable workforce housing options in our communities. Increased economic development will create resiliency within communities through job creation and economic diversification. Understanding gaps in the workforce housing market and developing ways to close those gaps will allow our communities to indirectly increase economic resilience. Due to the large geographic nature of our labor shed, a regional study with data available for further segmentation and analysis, by jurisdiction, would provide an effective and efficient method of project delivery. The study will encompass both counties and municipalities, as well as those in the private sector, with the goal of increasing workforce housing. Providing the necessary data to develop solutions to workforce housing will also address transportation and commuting patterns and improve quality of life for all residents, creating healthy and vibrant communities.

Scope of Study

The CRCOG is soliciting proposals to conduct a comprehensive study examining the state of workforce housing availability in the CRCOG area, which includes the counties of Chester, Lancaster, Union, and York in South Carolina. Knowing that housing—and housing types that are attainable for all residents—is fundamental to economic and workforce development, as well as a tool to combat persistent poverty and decrease the likelihood of homelessness, Catawba Region area leaders recognize this is an issue that merits study.

Starting with county and municipal level, prior to data collection, the firm will determine additional geographic levels of study areas, to be confirmed by the stakeholders, then identify where economic development growth areas are occurring. The consultant will establish additional study areas based on geographic and economic parameters. The goal of this study is to provide data at the county, municipal, and economic growth and/or population growth area levels.

Data should be collected and deliverables created for the Catawba Regional project area. Stakeholders will work together with the consultant to determine the localities and areas where data will be collected and deliverables created, including the four counties and identified municipalities, non-incorporated areas, and geographic/economic areas.

The CRCOG, on behalf of the project partners, seeks to complete a study that targets those with income between 80-150% AMI. The study should:

- Examine and quantify the existing housing stock of the determined geography.
- Identify where units are available, or where future development or redevelopment can occur.
- Report the price ranges of various types of housing units.
- Detail the gaps in the housing stock by both product availability and income affordability.
- Analyze linkages between housing and other services critical for economic growth, such as transportation.
- Provide data-based barriers to workforce housing, and possible ways to overcome those barriers, including examples from similar communities.

This study will focus on data collection to provide a data-informed analysis of the challenges and opportunities for the Catawba Region regarding workforce housing availability and affordability. The budget for this study shall not exceed \$250,000 and should address the entire service area of the CRCOG as described in Part 1 and Part 2.

Specific area deliverables and project scope are as follows:

Part 1: Catawba Regional Council of Government County, Municipality, and Other Local Area Housing Market Analysis Established by the Consultant

A. Population and Household Demographics

1. Basic demographic data for each area
2. Income by household type, age, race, etc.

B. Housing Stock Characteristics

1. Analyze housing stock by type, age, market value, vacancy, rent/own, second home, etc.
2. Benchmark analysis as appropriate with similarly sized regions as determined by the consultant, in consultation with stakeholders.

C. Housing Market Characteristics

1. Rental Housing
 - a) Vacancy rates, construction, and absorption.
 - b) Rents vs. income at 80-150% Area Median Income (AMI), including percentage of income used for rent.
 - c) Affordability of rents at local wages for certain occupations (first responders, educators, service industry, etc.).
 - d) Evaluation of housing cost burdens and barriers by housing type.
 - e) Housing needs of sub-populations, including seniors and younger, entry-level employees.
 - f) Identification of impact on the market by investment properties.
2. Owner Occupied Housing
 - a) Vacancy rates, construction and absorption.
 - b) Price points and average prices by housing type.
 - c) Mortgages vs. income at 80-150% Area Median Income (AMI), including percentage of income used for monthly owner costs.
 - g) Affordability of mortgages at local wages for certain occupations (first

- responders, educators, service industry, etc.)
- d) Evaluation of housing cost burdens and barriers by housing type.
- e) Housing needs of sub-populations, including seniors and younger, entry-level employees.
- f) Identification of impact on the market by investment properties.

D. Demographic trends that will influence housing trends

1. Population trends in the area, and the resulting changes over the study time period to be determined by consultant with assistance and projections from local planning staff.
2. How population and demographic changes will influence demand for types, cost, and location of housing.

E. National Housing Perspective

1. Evaluation of national housing trends as appropriate for benchmarking throughout the report.
2. Evaluation and recommendation of national trends that best apply to the area.

F. Commuting Patterns

1. Analyze commuter and residential patterns to determine where people live and work in the area.
2. Discuss housing affordability as it relates to distance to work centers, as determined by the consultant and approved by the stakeholders.

G. Survey of Employers (Sample Questions)

1. Sampling of major and small employers.
2. Employer's perceived need for workforce housing.
3. Employer's assets (land, building) that could be used to support housing.
4. Any ability to provide a financial incentive to support housing.
5. Ask employers the effect of housing stability on job performance and retention.

Part 2: Review Data to Identify Characteristics, Barriers, and Potential Solutions

A. Based on regional information, identify characteristics and trends that would indicate suitable areas and market demand for workforce housing development. Examples include

1. Unmet market demand or gap analysis for different types and rates of workforce housing identified by geographic units.
2. Ideal geographic locations and features, i.e. readily available infrastructure including water, sewer, roads.
3. Evaluation of amenities and their importance to various age populations (i.e. walkable neighborhoods, parks, etc.).
4. Include housing types that could potentially be constructed on ideal site locations.
5. Describe how sites could reasonably be developed given current constraints.
6. Identify trends in multi-family housing sector, to include unit production for those with incomes in the 80-150% AMI, and how those trends will impact affordability and the need for affordable workforce housing in the future.
7. Strengths and opportunities in the area that can be leveraged to achieve goals to encourage housing opportunities.

B. Describe any opportunities to modify public policies to support increased

expansion/supply of workforce housing, including

1. Mixed-income rental housing and residential investment.
2. Identify barriers to workforce housing development, such as land use policies, state policies, building or fire codes, development economics, lack of available infrastructure or lack of existing or planned higher density multi-family housing.
3. Review land development codes.
4. Identify moratoria and other local regulatory actions.
5. Examine comprehensive plans, and the housing element included in the comprehensive plan, for identified jurisdictions.

C. Describe possible recommendations for future housing programs and incentives to provide for private developers, to include best practices evidenced in other areas.

Part 3: Deliverables

- Executive summary of the regional study should include graphics, charts, maps.
- Executive summary of each identified jurisdiction and identified geographic and economic regions should include graphics, charts, maps. Include identified barriers and potential solutions. Highlight the most impactful data for local decision makers.
- Community profiles with information gathered in Part 1 and 2 for each identified jurisdiction and region.
- Executive summaries and community profiles to be followed by a full report with data appendix including charts, graphs and benchmarks.
- Presentation of study findings at Chester, Lancaster, Union, and York County Council meetings.

This study should provide the stakeholders with information to identify readily developable sites and solutions that can lead to the availability of diverse workforce housing within the next 0-5 years. Additionally, broader areas for future housing development will be identified, serving to guide housing growth into the future.

Timeline

- RFP issued: August 22, 2025
- Proposals due: September 19, 2025
- Anticipated date of award: October 17, 2025
- Anticipated notice to proceed: November 2025

The CRCOG and project partners anticipate this study to be completed within six (6) to nine (9) months from date of award, with a progress update given at least in 30-day intervals throughout the engagement.

Collaborative Partners

Core stakeholders in this work include the four (4) county governments that comprise the CRCOG. Other project funders and collaborators include local municipalities, special purpose organizations, and other organizations interested in community and economic development in the CRCOG area.

Proposal Components/Requirements

1. Overview of responding firm(s) and information on principal members of the project team.

2. Details regarding the methodology proposed to be used in addressing the project scope and producing deliverables.
3. Budget and budget narrative, including cost breakdown per county/municipality/geographic area of study, particularly noting if any cost(s) is/are based on population of the study area or other factors.
4. An overview of the timeline proposed to complete the project.
5. Listing of any concerns or barriers to successfully completing the project.
6. Details regarding any past or similar experience in producing similar reports or projects (details in which project team members were involved in said experiences).
7. References.

Evaluation Criteria

Proposals will be evaluated by a team representing the project funders and collaborative partners. All proposals will be scored based on the following criteria, which are not listed in any weighted order or priority.

- Qualifications of key staff.
- Quality of the proposal and capacity to meet deliverables outlined above.
- Relevance and success of previous projects as related to this study.
- Ability to complete the project within the planned six-to-nine-month timeframe.
- Cost.

Final selection and contract agreement shall be subject to approval by the Catawba Regional COG, with input from the study stakeholders. The CRCOG reserve the right to evaluate all submitted proposals and to move forward with interviews of the firms, and ultimately the submission deemed to be in the best interest of the stakeholders. The CRCOG may, in their sole and absolute discretion, accept or reject, in whole or in part, for any reason whatsoever any or all proposals; re-advertise this Request for Proposals; postpone or cancel at any time the RFP process; and waive any informalities of or irregularities in the process.

Submission Process

Each firm responding to this solicitation is officially a respondent. Each respondent must submit a sealed package containing an original and five (5) copies plus one (1) digital copy. Proposals must be submitted to

Elizabeth Morgan
Catawba Regional COG
215 Hampton Street
PO Box 450
Rock Hill, SC 29730

Proposals should be labeled with “Catawba Regional Workforce Housing Study” on the outside of the package and are due September 19, 2025, at 4:00 p.m. EST. Proposals may be submitted in person, by messenger, or by regular mail. Any package that is received after the specified date and time will be deemed late and will remain unopened.

Before submission, if any respondents have a question, they must be submitted in writing to emorgan@catawbacog.org no later than September 5, 2025, at 4:00 p.m. EST. Answered questions will be posted along with the RFP on the Catawba COG Website.

Contract Terms and Conditions

The CRCOG reserves the right not to select from the pool of applicants, should no agreeable proposal be received.