

Orleans County Local Development Corporation

121 North Main Street
Albion, NY 14411

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Request for Proposals (RFP)-Technical Operational Assistance
Orleans County Local Development Corporation
July 23, 2024

Background

The Orleans County Local Development Corporation (OCLDC) administers a Microenterprise loan fund, and provides technical assistance programming for prospective and existing entrepreneurs. The OCLDC is seeking the services of firms or individuals to assist in the general operation of the OCLDC.

Scope of Services

The firm(s) or individual(s) will be expected to provide the following services:

1. Assistance regarding the financing of economic development projects including:
 - a. The review and analysis of loan applications
 - b. Assistance in the preparation of loan closing documents and review of loan disbursement documentation
 - c. Assistance to borrowers regarding employment requirements and documentation
 - d. Monitoring of employment and financial information
 - e. Loan portfolio management activities
 - f. Reports to the Board
 - g. Other related assistance as required.
2. Technical assistance regarding commercial and retail project development
 - a. Economic development program planning and implementation
 - b. Microenterprise assistance
 - c. Other development activities as required.
 - d. Preparation of grant applications and other applications for assistance
3. Oversight and management of the OCLDC's Microenterprise programming including:
 - a. The processing of client applications
 - b. Coordination of the entrepreneurship training program
 - c. Intake of loan applications
 - d. Presentation of loan reviews to the OCLDC Loan Committee and Board
 - e. Oversight and coordination of the loan closing process
 - f. Disbursement of loan proceeds
 - g. Accounting, data collection
 - h. Reporting as required.
4. Provide general operational support to the OCLDC including but not limited to:
 - a. Generating and filing Public Authority documentation
 - b. Maintaining operational financial records such as check books, charts of account and financial reports to the Board
 - c. Provide support for Board meeting including generation of agendas, formal minutes, meeting documentation and attendance by staff.
 - d. Other activities of a general operations nature.

Proposals

Proposals should include the following:

1. Background information that describes the nature and history of the firm or individual, including client listings and references.
2. Identification and resumes of the persons who will provide the services.
3. A schedule of costs for the services to be provided, including hourly rates for labor and the method for calculating all other costs. The elements of each hourly rate must be broken out to include labor, overhead and profit. The OCLDC will award a cost reimbursement rather than a fixed price contract.

Selection

The OCLDC will rank the proposals received based on an evaluation of technical skills (50%), experience (30%), and cost (20%). The OCLDC will select, at its option, one or more contractors with which to enter into an agreement for services, subject to the negotiation of fair and reasonable profit. The selection of a contractor or contractors will be made in rank order.

Submission Procedures

One copy (electronic or paper) of the proposal should be addressed to:
Michael Dobell, CEO
Orleans County Local Development Corporation
121 North Main Street
Albion, NY 14411
MDobell@orleansdevelopment.org

Proposals should be received by the OCLDC no later than 4:00 p.m., October 1, 2024.

Miscellaneous

1. The OCLDC reserves the right to reject any or all proposals; to negotiate any elements of a proposal; to conduct interviews at its sole discretion; and to solicit and/or select contractors for the program outside of the scope of this RFP.
2. The OCLDC assumes no responsibility or liability for costs incurred by respondents to this Request for Proposals, including any requests for additional information, interviews, or negotiations.

EXHIBIT A

Affirmation of Understanding & Agreement pursuant to State Finance Law §139-j (3) and §139-j (6) (b)

I affirm that I understand and agree to comply with the procedures of OCLDC relative to permissible contacts as required by State Finance Law §139-j (3) and §139-j (6) (b).

By: _____ Date: _____

Name: _____ Title: _____

Contractor Name: _____

Contractor Address: _____

EXHIBIT B

Offeror/Bidder Certification:

I certify that all information provided to OCLDC with respect to State Finance Law §139-k is complete, true and accurate.

By: _____ Date: _____

Name: _____ Title: _____

Contractor Name: _____

Contractor Address: _____

EXHIBIT C

Offerer Disclosure of Prior Non-Responsibility Determinations

Name of Individual or Entity Seeking to Enter into the Procurement Contract:

Address: _____

Name and Title of Person Submitting this Form: _____

Contract Procurement Number: _____

Date: _____

1. Has any Governmental Entity made a finding of non-responsibility regarding the individual or entity seeking to enter into the Procurement Contract in the previous four years? (Please circle):

No Yes

If yes, please answer the next questions:

2. Was the basis for the finding of non-responsibility due to a violation of State Finance Law §139-j (Please circle):

No Yes

3. Was the basis for the finding of non-responsibility due to the intentional provision of false or incomplete information to a Governmental Entity? (Please circle):

No Yes

4. If you answered yes to any of the above questions, please provide details regarding the finding of non-responsibility below.

Governmental Entity: _____

Date of Finding of Non-responsibility: _____

Basis of Finding of Non-Responsibility:

EXHIBIT C (Continued)

(Add additional pages as necessary)

5. Has any Governmental Entity or other governmental agency terminated or withheld a Procurement Contract with the above-named individual or entity due to the intentional provision of false or incomplete information? (Please circle):

No

Yes

6. If yes, please provide details below.

Governmental Entity: _____

Date of Termination or Withholding of Contract: _____

Basis of Termination or Withholding: _____

(Add additional pages as necessary)

Offerer certifies that all information provided to COIDA with respect to State Finance Law §139-k is complete, true and accurate.

By: _____ Date: _____ Signature

Name: _____ Title: _____