

**REQUEST FOR
QUALIFICATIONS AND
PROPOSALS BY THE
VILLAGE OF NEW PALTZ
(In Ulster County, New York)
FOR PROFESSIONAL SERVICES TO DEVELOP A:**

**A NEW PALTZ GREEN INFRASTRUCTURE
CAPITAL IMPROVEMENT FEASIBILITY PLAN
(URBANIZED AREAS FOCUS)**

Qualifications/ Proposals Due Date: October 26, 2017 by 1:00 P.M

Qualifications/ Proposals Opening Time: October 26, 2017 at 1:00 P.M.

Qualifications/ Proposals Opening Location:

NEW PALTZ VILLAGE HALL,
MAIN CONFERENCE ROOM,
25 PLATTEKILL AVENUE, NEW PALTZ, NY

SECTION 1. PROJECT SUMMARY

A. DESCRIPTION & OBJECTIVES

The Village of New Paltz (“Village”), in collaboration with the Town of New Paltz (“Town”), will develop a professional services based planning project to prepare a ‘New Paltz Green Infrastructure (GI) Capital Improvement Feasibility Plan’ (Project). Project funding support comes from a planning grant award from the NY State Department of Environmental Conservation’s (NYSDEC) Hudson River Estuary Program (HREP).

The targeted product will be a plan and program, derived from robust process, that presents an evaluation of the feasibility to site and implement Green Infrastructure. The desired product will present a three-year GI strategy to advance GI projects readiness and construction. This GI Capital Plan will provide technical analysis, establish local capacity around GI (preferably including assistance developing local Geographic Information Systems (GIS) and facilities management systems), and it will aid the strategic alignment of resources to quickly and cost-effectively implement green infrastructure within public sector projects, in private land developments, and in partnership arrangements. This Project will also help facilitate GI land development initiatives and standards and help foster the formation of other programmatic approaches to sustainable GI development and implementation.

While this Request for Qualifications & Proposals (hereafter RFQ&P) emphasizes advancing capital project selection and readiness, which are forms of consulting service often assisted by engineers, for this Project the Village desires programming to be foremost assisted by planners and landscape-architects within the screenings, selections and site-level preparations. Since the Project intends to advance conceptual planning, feasibility analysis, and other forms of impact assessment for use in identifying and preparing capital projects, it is certainly recognized that engineers have a role in this process.

The selected Consultant will deliver qualified analysis and public engagement in order to forge local capacity and GI implementation strategy and sites readiness. It will educate the community on GI benefits and technical components with intent to leverage environmental protection, community resiliency, enhanced quality of life, and smart and sustainable development. The Project will help enhance fiscal control and integrate gray and green infrastructure. A particular interest is providing planning and programming to advance mitigation of the Village’s potential for Sanitary Sewer Overflows (SSOs). Feasibility planning will also present nuanced strategy to assist infrastructure maintenance and guide quality redevelopment and growth in New Paltz.

B. BACKGROUND INFORMATION

1. **Location & Demographics** – The Village and Town of New Paltz are municipal corporations. The Village is 1.8 square miles and the Town is 33.9 square miles. For the whole Town, the U.S. Census 2010 Demographic Profile (DP-1) indicates:
 - Population: 14,003 (with 6,818 of the residents situated in the incorporated Village)
 - Average Household Size: 2.45
 - Median Age: 25.3

- Households: 4,515
- Median Family Income: \$ 85,762

New Paltz is a well-known Mid-Hudson community. We have remarkable natural assets including the ecologically significant Shawangunk Ridge environment. There are extensive open spaces and agricultural lands situated around the Wallkill River and the Village's defined core and main highway corridors extending from it.

New Paltz also has diverse historic, cultural, academic and recreational resources. We host the National Landmark Huguenot Street Historic District, acclaimed SUNY-New Paltz, and a vibrant Main Street with retail and dining options. New Paltz is a hub on Wallkill Valley Rail Trail, the emerging Empire State Trail, and serves as gateway to Mohonk and Minniewaska Preserves. We have unique housing, employment, transport and infrastructure needs. There is desire to maintain historic, small town character that is distinctly New Paltz at the same time there is preparation for public-private partnerships and other collaboration, as well as resilient growth and change.

2. Project Location - Analysis and strategic capital planning and programming for this Project will occur in the Town of New Paltz centered on the part of the Village that is located east of the Wallkill River, plus urbanized areas adjacent to it. Places where feasibility analysis will occur are ones preliminarily identified as possessing potential for environmental, water resources and urban design enhancements through the application of Green Infrastructure, including by presenting potential to help eliminate storm flow intrusions into sanitary sewers.

The specific proposed Project footprint is within New Paltz's part of the U.S. Census 2010 Urbanized Area for Poughkeepsie-Newburgh, NY-NJ. This area encompasses roughly 10.5 square miles; yet, analysis will focus on 2.5 square miles or less encompassing the incorporated Village, including the edge of SUNY-NP's campus, plus 1.3 square miles of urbanized area adjacent to the Village and main corridors.

3. Screening Context - The Village has initiated sub-area analysis, identifying 40 candidate locations for first-level GI feasibility screening. Data and descriptions are being assembled for each location which will be turned over to the Consultant to assist initial criteria formulation and analysis.

A potential program of Consultant work and tasks is elaborated below. A Project objective is to define and advance GI applications in New Paltz by focusing on ones that public works and other municipal actors can replicate, such as to "green" streets as complete street retrofits are made, or as various other public works capital projects advance, such as sewer projects, at buildings and on parklands. Still, this Project should also build eagerness to advance GI installations in partnership with private parties as new building and redevelopment occurs.

Project Funding & Contracting: Underwriting primarily comes through a Hudson River Estuary Program grant administered by NYSDEC. Consultants should note that since the Project is funded in-part through a grant, it will be a requirement to provide deliverables that adhere to the Village's contract with New York State, such as by providing appropriate recognition of external funding

support and through the submission of sufficiently detailed documentation of sub-contractor (Project Consultant) progress on expenditures, tasks and deliverables completion as per specific grant budgetary requirements according to a professional services contract that will be effected between the Consultant and the Village and so there is a full ability of the Village to achieve reimbursement for all qualified Project expenses¹.

Under Article 15A, Executive Law, the State is committed to providing Minority and Women Owned Business (MWBE) equal opportunity for participation in government contracts. The Village's Contract goal with NYSDEC is 30% MWBE participation.

SECTION 2. PROCESS & REQUIREMENTS

A. ANTICIPATED TIMELINE: PROPOSALS, REVIEW & CONTRACTING

<u>Date (s)</u>	<u>Activity</u>
October 3, 2017	RFQ&P Release
October 19, 2017	Questions on RFQ&P Due by 1:00 PM
October 26, 2017	RFPQ&P Responses Due by 1:00 PM
October 26, 2017	RFPQ&P Responses Opened at 1:00 PM
November 2, 2017	Interviews (target point)
November 8, 2017	Contract Execution (target point)

B. COMPLIANCE WITH RFP REQUIREMENTS.

Proposals must be made in strict accordance with instructions set forth in this RFQ&P.

Although this is a professional services contract, the Village reserves the right to invoke Village Code Chapter 77 entitled Best Value Pricing.

Proposals shall be reviewed for completeness and compliance with Proposal requirements set forth in this RFQ&P. The Village shall have no obligation to review or consider, and reserves the right to reject, any Proposal that fails to satisfy or conform to any RFQ&P requirements, while it also reserves the right to waive any irregularities, at its discretion.

1. Proposal Submission-Time & Manner

- a. Proposals will be accepted until 1:00 PM on October 26, 2017; Proposals submitted after that date and time shall not be considered. The ultimate responsibility for delivery of a Proposal rests solely with the Consultant. The Village shall make no exception to the

¹ With the exception of all, or a portion of, the last invoice planned under this Project, the intent is for the Village to pay invoices to the selected Consultant (sub-contractor) in a timely fashion contingent upon the receipt of adequate and appropriate documentation required from the Consultant, and for the Village to subsequently request funds reimbursement from NY State under the Grant award. However, payment of the final installation for Consultant services will be linked to adequate progress by the Village obtaining NYSDEC acceptance of reporting and approvals of reimbursements by them.

submission deadline based upon postal or other delivery service delays, even when untimely delivery of the Proposal was no fault of the Consultant.

- b. Proposals packages shall be sealed in an envelope marked “Proposal: New Paltz GI Capital Improvement Feasibility Plan”. There shall be two parts to proposals packages: 1) A Project Qualifications-Based Proposal; and 2) a Fee Proposal. The Fee Proposal shall be reproducible and contained in a separate sealed “Fee Proposal” envelope.
- c. Proposal packages shall be physically delivered to: Alberta Shaw, Village Clerk, Village of New Paltz, 25 Plattekill Avenue, New Paltz, NY 12561. Physical printouts of the Project Qualifications-Based proposals shall be bound in one (1) single volume. There should be a total of eight (8) printed copies, one of which shall be an unbound, reproducible version. Proposals shall not be sent by fax transmission.
- d. One electronic Portable Document Format (PDF) version of the Qualifications proposal must also be supplied by the required point of proposal submission to:
Clerk@villageofnewpaltz.org
- e. The Village shall not be obligated to return any Proposals or materials submitted.
- f. Proposals may be modified, corrected, or withdrawn in writing, sent by mail or e-mail, provided these are received prior to the date and time fixed for Proposal receipt with Village acknowledgement of receipt; and, provided there are clear written descriptions of such modifications, corrections, or requests for withdrawal.

C. PROJECT PROPOSAL FRAMEWORK

1. Consultants are requested to submit written questions, interests, requests for clarification or concerns regarding the Project, including on ambiguities, or defects in the RFQ&P, prior to the established deadline on October 19th, 2017.

2. *Supporting Documentation / Exhibits.* Following is an inventory of information that all Applicants and/or the approved Consultant must supply as part establishing an executed contract for the Project with the Village, including: Non-Collusion Affidavit (each Application); M/WBE compliance (to be completed if Consultant is awarded contract); a Professional Services Agreement (PSA) Contract with all required exhibits (to be completed if Consultant is awarded contract); Consultant Insurance / Bonding Requirements (to be completed if Consultant is awarded contract).

- Exhibit A - Non-Collusion Affidavit
- Consultant Insurance Requirements -- All certificates of insurance, covering all consultant team parties, are to provide that the insurance evidenced by such certificates shall not be cancelled or materially altered except after thirty (30) days with prior written notice to the Village of New Paltz. The Village shall be named as additional named insured on commercial general liability/contractual liability and vehicle liability policies. Unless waived in writing by the Village, all policies are to be written by insurance companies

authorized to do business in the State of New York and which are acceptable to the Village of New Paltz.

- Commercial General Liability, with a limit of not less than \$1,000,000 each occurrence. and contractual liability on an occurrence basis with the following limits of coverage:
- Workers compensation insurance, as required by law and NYS Project Contract.
- Comprehensive Business Automobile Liability Insurance: in the amount of at least One Million Dollars (\$1,000,000) per occurrence.
- Professional Liability: \$1,000,000.

3. *Informational:* Template Professional Services Agreement (PSA) Contract with Exhibits. There will be a contract completed between the Consultant(s) selected and the Village. This will contain standard language that is subject to approval by the Village prior to execution.

4. So as to allow sufficient time for the issuance of Addenda, if any, in no event shall any consultant submit any written concerns regarding ambiguities, questions, or defects less than five (5) working days prior to the Proposal due date (point identified in Sub-section A.).

5. The Village assumes no responsibility for statements or representations made by its officers, agents, or employees prior to the execution of any Contract, unless such representations are made in writing and specifically included as part of the RFQ&P, as a posted Addendum, or subsequently included in any resulting contract.

6. Nor shall the Village be liable for conclusions or interpretations drawn by consultants from information supplied. No increase in the Contract Amount shall be made based on Consultant's lack of knowledge or misunderstanding of Project requirements and/or site conditions.

7. Any failure by the Consultant to obtain all information it deems necessary to satisfy itself that it understands Project intent shall not relieve the Consultant, if awarded the contract, from complete performance of all Work for amounts stated in its Proposal. Submission of a Proposal shall be deemed certification that Consultant has taken all steps necessary to become fully informed as to the nature and requested scope of the Work to be done, expectations, conditions, requirements, specifications, preliminary Contract Documents, and accuracy of estimates as to quantities of materials and labor. Failure to take such steps prior to submitting a Proposal will be at the Consultant's own risk and Consultant's failure to take steps will not: a) secure relief on a plea of error or mistake; b) excuse successful Consultant, if awarded the contract, from performance of duties and obligations imposed under terms of the Contract Documents; c) serve as basis for modifying the Contract in any way; or, d) justify any request for added compensation or time.

D. PROPOSAL FORMAT & CONTENT

1. Proposal information shall be presented, to the extent possible, in a manner corresponding to, and identified by, the section or subsection titles in this RFQ&P. All blank spaces on any required form, attachment or certification must be completed in ink or type written.

2. To be considered complete, Proposals must address the questions raised, and provide a

complete response to information requested in various Sections of this RFQ&P. Each consultant must also submit the information stated herein and shall include the following:

- a. Letter of Intent – A narrative should reflect the proposer’s understanding of the Project and describe its method of Project delivery.
- b. Names and addresses of all firms involved in the Project, with identification of the lead, descriptions of respective responsibilities, and estimates of the percentage of the overall Project work that will be assigned to each entity.
- c. Related projects on which firm(s) performed comparable work in the last 5 years.
- d. Names, titles, resumes and responsibilities of personnel executing the Project, and descriptions of relevant experience of the Project Leader and Firm Partners.
 - ❖ Include designation of Project principal
 - ❖ Identify Project Manager
- e. Project Description: Describe the planned Project. Outline the Project design and describe Tasks (i.e., methods and techniques) that will be conducted to meet the Project’s objectives.
- f. Clearly specify personnel working on various aspects and Tasks in the Project.
- g. Project timeline, including estimated date of Project completion, with a rough breakdown of the number of and specific personnel (and hours) or other resources required per Task. The proposed budget for the Project and Tasks shall be itemized in the separate Cost Proposal (see below). *Note: The current contract with NYSDEC for this Project extends to May 2018. It is requested for the Consultant portion of the Project to be specified for completion by May 15, 2018; however, it is contemplated that a limited duration extension will be allowed by NYSDEC providing for more time to complete the Project. An extension would be contingent on the grant underwriter’s allowance for more time. Even with the provision of such an extension, the Village does seek to expeditiously progress development of this Project.*
- h. Provide general hourly rates for all personnel involved in the Project.
- i. Names, addresses, phone and emails of three (3) references for similar projects.
- j. Detailed description of consultant’s approach to Project and proposed work plan.
- k. **COST PROPOSAL -- PROJECT COSTS SHALL BE CLEARLY DEFINED AND DESCRIBED WITHIN A SEPARATE SEALED & DISTINCTLY LABELED ENVELOPE.** *The Cost portion of the Proposal shall only be provided as part of the physical materials (written) submission and only within a separate sealed envelope that is isolated from the rest of the main, descriptive proposal which explains qualifications, a prospective program of work, associated tasks, schedule of work delivery, etc. Cost proposals will not be opened until Proposals have been initially ranked and evaluated with the initial findings presented to the Village Mayor and/or Treasurer in order to identify the best (highest-ranked) qualifications-based proposal and the associated rank-orderings of all others submissions received and evaluated. Cost proposals will then be opened and evaluated and adjustment will be provided to generate the identified Vendor with whom the Village will work to execute a Project Contract. Cost Proposals shall provide total Project cost and sub-costs grouped according to the consultant’s*

proposed Tasks and Deliverables that the consultant proposes to deliver. The budget shall not to exceed the available grant budget of \$45,000. The Village seeks to execute a professional services contract so as not to surpass this budget. Since there is a not to exceed budget requirement, vendors' proposals may present budget contingencies. There should also be expected breakdowns of labor by personnel and classifications, as well as for any sub-contractors versus the primary or lead consultant. There should be clear breakdowns of staff assignment and roles and the overall program and its intended sequence. Note – the Project Contract will be contingent upon the continuing availability of underwriting assistance for this Project from NYSDEC HREP.

SECTION 3. PROJECT DEVELOPMENT:

- A. Advisory Committee Review of Deliverables** – An Advisory Committee (Committee) composed of staff, elected and appointed officials, was formed to help steer the Project. Village Planner will be day to day contact. Committee members reviewed the preferred Project scope. It will help guide the Consultant who will facilitate a set of meetings to lead plan formulation and review of Products.
- B. Requested Scope of Work** – A potential desired Project scope is laid out in detail in Section 5 herein. An objective is for the Committee to comment on reports/ products, such as described in Tasks 1-10. Since a subject-oriented capital plan is being formed, products generally will remain as drafts as the Project progresses. The Committee will be familiar with revisions. The process to produce the GI Infrastructure Capital Improvement Feasibility Plan will be cumulative. This way, initial products would be expected to be folded into the final plan. Products incorporated into the Final Report will include relevant comments from the Village. The deliverable from the scope of work that will be considered “final” is the Final Report (Plan) in Task 9.
- C. Committee Comments** - Comments on draft deliverables in Tasks 1-10 will be collected by staff, with a set of consolidated comments for each Deliverable presented to the Consultant. The Village will clarify issues or resolve conflicts, as needed. This way, all Project interim products and deliverables generated for incorporation into the Final Report by the Consultant will be based upon input from the Committee.
- D. Terms & Conditions** - Defined Project Deliverables will be submitted in printed and digital form with sufficient print copies. Unless otherwise identified, there shall be ten (10) prints of each deliverable and an accessible (OCR-formatted and not copyrighted) digital PDF document compilation.
- E. Project Timeframe** – The Village anticipates that an accepted Scope of Work could be completed within approximately seven (7) months. If an extension is authorized by the Project underwriter (NYSDEC), it would be the discretion of the Village to provide for a longer time-frame for Project development either within the executed professional services contract, or an amendment to it.
- F. Legal Notices** – Terms of the contract executed between NYSDEC and the Village of New Paltz for the grant to fund this consultancy will apply to the subcontract executed between the Village

and the selected lead Sub-contractor Consultant and any additional collaborating Consulting Team members. For details, refer to the State of New York Master Contract for Grants.

SECTION 4. EVALUATION CRITERIA & SELECTION FRAMEWORK

The Village shall be the sole and final judge of the merits of Proposal submissions. The Village will evaluate proposals and reserves the right to select the proposal it deems to be in the best interest of the Project.

- A. **Evaluation Categories & Factors** – Keeping in mind that a best value pricing format is being used, the Consultant selection will be based on these criteria:
- a. Consultant understanding and familiarity with local needs and interests.
 - b. Previous experience and capabilities in comparable projects and technical experience with: ecological analysis, infrastructure programming, policy planning, and public outreach and engagement.
 - c. Demonstrated ability to provide designs/ development solutions in urbanized places/ edges which are implemented and embraced by the community.
 - d. Experience using graphics, renderings, and GIS-based tools and products to assist Project and topic education and information exchange.
 - e. Specific approach and program of work the firm proposes, with explanation on how the community will deploy Project results during and after the grant.
 - f. Demonstrated example(s) of assisting communities with benefit-cost analysis to aid evaluation and selection of priorities.
 - g. Experience formulating and winning relevant NY State, Federal or foundation grants for stormwater / sanitary sewer facilities development.
 - h. Past record of performance on contracts with other small governments, including: date of project(s), and based on control of costs, quality of work, and whether project(s) were grant funded.
 - i. Aptitude and experience advancing GI and its integration with gray infrastructure.
 - j. Experience assisting communities to organize and refine aspects of a facilities GIS in conjunction with the development of a particular project.
 - k. Capacity of Consultant to perform work within time limitations, based upon explanation of proposed Project schedule and milestones, breakout of tasks and description of the Project sequence, as well as explanation of the way the Consultant will achieve the desired Project by the end of the grant term.
 - l. Qualifications of the individual who will be Project Manager, as well as others who will have major involvement with key Tasks in this Project.
 - m. Cost.

SECTION 5. REQUESTED SCOPE OF WORK

A. TASK OUTLINE – It is acceptable for work programs proposed by applicants to differ from the potential one presented within this RFQ&P. Proposals must clearly present tasks, deliverables, and rationale. The total cost for all Consultant services (as would be specified in the separate Cost-Proposal) must be coherent. For the purpose of this RFQ&P, it is presumed there can be overlap with multiple Tasks underway simultaneously.

Task 1: Project Kick-off Meeting - At the Project's onset, the Committee will convene for a two- to three-hour meeting led by the Consultant. It will cover Project goals, work program, needs, opportunities, and issues, addressing: study area; methods for collecting and analyzing data, including establishment of screening criteria, suitability analysis, and later-stage feasibility analysis and capital projects case report preparation. The Kick-off will also be used to prepare for a major public meeting intended to engage/ educate the community on GI (Task 2) and review the Consultant's proposed public engagement plan for the entire Project².

Concerning work program, the Consultant will facilitate dialogue on expectations. It will cover: overall processes for Project development; Project schedule and milestones; deliverables; analytical limitations; metrics formation; format and content of technical analysis; data needs, inventory, collection, and format; and program of public participation. It will equip the Consultant with context and prepare the Committee to help implement the Project. The kick-off should also allocate time to explore potential scope and content of Task 3.

There should be discussion of locations in an 'Initial Sites Screenings' inventory the Village identifies as places to explore for GI installations. This analysis will link to and inform subsequent screenings to narrow that set down to 15 to 20 places which will receive more detailed analysis, and after further distillation, will document GI establishment at a smaller set of sites that offer strong potential suitability to host high impact GI priority installations. Those latter three to five priority GI locations will receive more rigorous planning to achieve cost-beneficial installations of GI. During detailed feasibility analysis, for the priority sites, the Consultant will prepare detailed contextual analysis and preliminary GI construction readiness.

This Task must encompass discussion about how future GI program efforts could be organized, implemented, managed, and financed within the community. It also could involve definition of management practices for redevelopment which incorporates GI. It may also highlight techniques and resources private parties and land developers can access to advance the use of GI.

Deliverables - Present:

1. Digital copies of meeting agenda, at least five days prior to meeting, along with discussion materials, such as narrative document(s) on the proposed program and

² There is an objective to use this Project as a means to develop, populate and actively use the spatial data inventory of the Village, bolstering use of a planning-GIS, as well as a DPW-based electronic system of facilities information and management. The latter is based, to an extent, on limited electronic records, or ones maintained by the Village's Consulting Engineer and not accessed daily by staff or volunteers. Still, forming facilities management capabilities is a subsidiary aim of the Project compared with forming the GI CIP Feasibility Plan.

sequence for Project development, Project goals and objectives, proposed site evaluation criteria, etc. (all preferably prior to meeting).

2. Present proposed designs for Project Tasks 2, 3, 5 & 6.
3. Present a detailed design and timeline for the major public meeting – Task 4.
4. Within five days of meeting, present a one or more page meeting summary containing a list of follow-on actions with identification of the responsible party.

Task 2: Site Screening/ Scoring Matrix & Preliminary Conditions Review (+/-20 sites). The Consultant will draft site and GI screening methods, establishing a robust set of qualitative and quantitative criteria for use evaluating potential types of green infrastructure to be deployed in different possible locations. The Consultant will refine criteria, including narratives describing each criterion, as well as explanations of values/ scales for variables, based on feedback. Documenting potential for GI in locations which will aid evaluation of multiple potential sites for GI installation through objective analysis. It can identify impacts that may be expected at possible GI locations and enable comparisons. It also sets-up quantification and assessment of benefits versus costs in latter stages of Project feasibility assessment, when selected locations will receive preliminary designs, planning-level costs estimates, and other analytical documentation needed to advance GI capital projects readiness for priority sites.

‘City Green: Innovative Green Infrastructure Solutions for Downtowns and Infill Locations’, 2016, by USEPA, page 5, notes:

Green infrastructure manages stormwater to control flooding from small storms and improve water quality and offers a wide range of other environmental, economic, public health, and social benefits.

Systematically defining and analyzing factors using Consultant advice will build capacity of stakeholders to understand opportunities and constraints, methods for preparing and implementing GI, helps build commitment and focuses efforts on potential high-impact projects.

Variables and methods for screening could encapsulate factors like: watershed and sub-basin features; soils thresholds and subsurface conditions, like depth to bedrock and groundwater; surface cover characteristics; topography; ecological considerations; area and site characteristics, like: land ownership, property configuration (street/ property limits), use features, area available for GI installation(s); relationship of a location to sanitary sewer and stormsewer infrastructure³, if present; best estimates of the state of repair and capacity of existing infrastructure; stormwater catchment; site visibility/ educational and extension value of a location; site accessibility; and maintenance and monitoring capability.

Using Initial Site Screenings, the Consultant will progress detailed and qualified assessment of each location’s: natural resource base, land use, infrastructure, and other social and environmental conditions. Also, under this Task, the Consultant will perform study area reconnaissance to build basic familiarity with candidate GI locations⁴.

The product will be a detailed 2nd stage suitability screening narrowing down the 40 places to

³ The Village is doing camera work on select sanitary sewers using a 2016 NYSDEC Engineering Planning Grant. Findings or results of this work, to date, likely preliminary, will be made available to the selected Consultant.

⁴ Village agents, municipal staff, and interested Committee members will be available to assist these screenings.

15 to 20 locations that, based on rationale presented, appear potentially well- or better-suited to GI. The Consultant should also obtain a recent, high resolution aerial image of the study area and prepare a Project Base Map. The draft at this stage should present a matrix and contain maps, graphics, photos, tables, and text, with analysis across multiple sites and variables. The Consultant may also review municipal policies to ensure fit of this Project with them.

Deliverables:

1. Proposed GI screening criteria that will be used to assess potential GI at locations;
2. A Scoring Matrix establishing the format for data collection and evidence-based, objective analysis of the qualities of potential GI installations and likely impacts.
3. A Project Base Map.
4. A ‘Suitability Screening Report’, developed as a chapter of the final Plan, populated with data, using Initial Site Screenings and refined criteria and scoring based on Village feedback, identifying 15-20 locations for GI development. The product should contain some case-based analysis to aid user awareness.

Task 3: GI & LID Background Product & Design Guidelines (Plan Element). There is varied understanding in New Paltz, like most places, on GI and its benefits. The Consultant will draft a basic, concise document describing GI practices and ways it can be used to aid water quality, infrastructure, and environmental enhancement. Green Stormwater Management (GSM) Guidelines could be formed for placement within codes, or for other agreed upon purposes.

Recognizing that GI is becoming more readily accessible and there is a growing knowledge about GI applications, feasibility, construction and operation, and more prevalent GI utilization in the Hudson River watershed, the background document could use narratives, pictures, diagrams, and links to reference documents, local and regional plans, policies, and projects, to explain and showcase ways GI is being deployed and could be beneficially structured, including by highlighting potential for public, public-private, and private GI projects. The product will be developed to comprise a stand-alone chapter in the final plan, also expecting that aspects of it will be used in major meeting presentations and handouts.

Since New Paltz is focused on modernizing sewer systems and reducing potential Sanitary Sewer Overflows (SSOs), and preparing for community resiliency, a major piece of the document, or another stand-alone chapter, must explain the role GI can play in advancing long-term flood control and Sanitary Sewer System Capacity, Management, Operation, & Maintenance (CMOM) programming. This jibes with CMOM’s goal to mitigate the effects of overflows, by reducing flows into sewers, and it will aid understanding of the importance and methods for modelling flows in catchments. It can describe ways that alternative GI projects can divert flows from sanitary sewers and/or storm sewer systems and how naturalistic design and distributed stormwater management can equip the community for climate change. It also aids understanding of the structure and values assigned to ranking criteria.

Recognizing GI must be linked to and integrate with private development/ redevelopment in New Paltz, as well as that there must be proactive preparation for public-sector GI, guidelines are requested which can help foster GI implementation during site plan review and mesh it with the Municipal Separate Storm Sewer (MS4) system. GSM guidelines could establish GI

terminology and preferences for developing GI and connecting it to the MS4, such as at property edges, and in and by streets. This can promote coordination of private and public GI and potentially the appropriate reuse of storm flows, such as fitting with public health standards applying to using stormwater in landscape irrigation, or other in other ways.

Guidelines can also promote use of GI in smaller projects and help local stakeholders be familiar with its practicable use. Design standards can also help fit GI into landscaping. They could also present incentives to advance GI; highlight preferred management practices address focuses in the Wallkill River watershed; and given urbanized area and urban edge community form, establish scales and methods for conserving wetlands, streams, forest and other stormwater features on and adjacent to sites.

Deliverables:

1. Narratives document along with graphic content on GI practices and ways it can be used to aid water quality, infrastructure, and environmental enhancement, developed to comprise a stand-alone chapter in the final plan, with sufficient content explaining GI's role in SSO mitigation.
2. Green Stormwater Management Guidelines. This may be developed as a stand-alone chapter or an appendix.

Task 4: Meeting & Outreach to Educate, Train & Engage Stakeholders on GI and Obtain Feedback to Advance Plan Formation. A major meeting will be convened, involving the Committee, to educate on GI and obtain input on screening, selection and analysis of GI feasibility. It is anticipated that the broader community, when consulted through this forum, will have valuable insights on issues and ways to enhance New Paltz using GI. This will assist the Consultant with refining GI feasibility and forming preliminary designs for key GI capital projects. Target audiences, besides staff, elected officials, and municipal volunteers, would be land owners and development professionals, membership of Wallkill River Watershed Alliance, and the SUNY-NP community. Publicity will be posted to the Village website, as will meeting products, and it is possible there could be a municipal web page folio developed for this Project.

Deliverables:

1. Refined meeting design (building on Task 1 deliverable), with press release(s) and meeting flyer (staff will aid publicity), agenda, one week prior to meeting.
2. Meeting handout(s)/ PowerPoint presentation
3. Meeting summaries, within seven days of Major meeting
4. Tabulated findings, such of as if opinion research is performed as part of this Task, in-line with Task 5 advancement.

Task 5: Priority GI Locations Selection. A major aim of this Project is to build capacity to construct GI, achieving readiness to implement a set of GI capital improvements. This involves having comprehensive and quality documentation, and preferably approvals, in-place so the community can align external funding support and/or advance construction. Based upon preceding discussions and products that define areas that can benefit from GI, types of practicable GI at different places, and preliminary analysis of the degrees of impacts alternative

GI options could deliver, this task represents a major decision-point that will involve the 3rd stage screening whereby a small set of projects are selected to receive detailed Consultant feasibility analysis, project preparation, and packaging.

At a meeting with the Committee, using discussion documents distributed beforehand, the Consultant will present and facilitate discussion on work completed to-date in Tasks 1-4. It will overview Site Screenings of +/-20 sites analyzed. Products will discuss, and there will be dialogue on, pros and cons of sites and their ratings. The objective is to form consensus on the up to five sites selected to receive the next stage, detailed feasibility analysis.

Some type of summary comments shall be developed for sites that do not advance to full feasibility review. They will describe why the Consultant and/or Committee does not believe those locations are physically, economically or otherwise highly rated and considered more feasible for GI development at this time. The Consultant will also detail types of conditions under which the concepts or alternatives at those non-priority locations could potentially become viable.

The Contractor will present its proposed organization for how it will prepare and present the site-specific feasibility analysis write-ups. These will present qualified information to document that the proposed green infrastructure project is feasible to construct at that location. A template for this level of study is established by NYSEFC's GIGP. Discussing how feasibility analysis will be prepared will help ensure the Consultant and Committee are on the same page.

Deliverables. Provide:

1. Committee Agenda and handouts, provided one week prior to Meeting, including:
 - a. Next-stage 'Scoring Matrix' for the remaining +/-20 potential GI sites, with requested discussion.
 - b. Content requirements for site-specific feasibility studies.
2. Meeting summary, provided no longer than one week after meeting
3. As early as possible in Project development, form consensus on a site, or sites, the Village's limited budget for Professional Land Survey should be allocated towards.
4. Contractor presents proposed scope and content (elements) for each site-specific feasibility analysis report.
5. Committee consensus on the final scope and form of the feasibility analysis reports.
6. Identification of the specific set of locations to be provided full analysis under Task 6.

Task 6: Feasibility Analysis. For each GI Priority Location, the Consultant will produce a stand-alone feasibility study, which preferably will form a separate element of the plan, comprehensively presented, possibly as a case-study. Detailed planning- and landscape-architecture level conceptual/ preliminary narrative and graphic design(s) and cost-estimating will be produced for all Priority Sites. Documentation generated will include detailed descriptions of: preferred GI concept(s) for specific places; existing conditions; present graphic and narrative concept plans describing major GI capital improvement elements, plus discuss alternative options. There will be presentation of site photos; planning-level cost-estimates; a compliance screening; and, a benefit-cost analysis (BCA) for each site, with one overarching write-up of BCA methodology and assumptions.

The Consultant will be provided access to a limited Professional Land Surveyor analysis the Village commissions in conjunction with this Project. The intent is to confirm public ownership, or feasible control, of select site(s) where GI project implementation is targeted.

Additional subjects to address include: Project metrics⁵; cost estimates and funding options; timing and phasing of site development; short-term design, construction, and other costs, versus long-term maintenance and benefits; key considerations regarding land owners and stakeholders; and necessary levels of Village and/or Town commitment.

Specifically, the Consultant will describe, diagram, and illustrate each site-specific GI development strategy starting from existing conditions, through project construction and start-up through sustained stewardship and operations and maintenance. The Consultant will address topics like site control, acquisition, remediation, site preparation, suggested construction program and effects on the area. It will discuss plan and projects implementation and phasing, publicity objectives, funding sequences, and techniques for each phase of projects. This way there can be information on cost of project components as well as discussion of companies that design, build and contract such infrastructure, as well as discussion of durability and maintenance considerations for different types of GI put forward. Analysis should identify potential incentives for collaborating with developers. To establish projects that provide for desirable enhancements of community character and strong economic development potential, the Consultant will also provide planning-level descriptions of land and construction costs, market trends, and other factors that inform anticipated long-term value of each GI development site.

An aim is to build consensus on rationale and need for installing GI in New Paltz. There is also intent to build familiarity with and broad support for specific plans of action for each project.

One or more sites where GI readiness is advanced must involve design(s) that mitigate SSO issues. The Consultant will discuss how to make capital projects viable under current economic conditions. While one purpose of study is to set-up external funding appeals, the products should touch on ways that particular projects, or alternative variations of them, can be implemented without significant reliance on increased taxes, or other governmental support.

Deliverables:

1. Three to five stand-alone feasibility studies with clear rationale and addressing all components within the designs that the Committee adopts.

Task 7: Implementation Strategies Report. Using findings from preceding Tasks, the Consultant will generate an element, which is a key deliverable product in this Project, which compares projects and sites, including by using benefit-cost assessment. It is not an objective to define a single highest GI capital project priority, but to help establish a robust, area-wide development framework for broadening and leveraging use of GI. It will offer detailed guidance for implementing GI capital improvement projects at each site, as well as possible ways to address contingencies. The Implementation Strategies Report should identify where GI capacity is not

⁵ One desired metric is projected impact on urban growth. Another is long-term projection of impact on water quality. Still others are ease and practicability of installation and operation and maintenance once constructed.

available as well as where conditions may hinder its use and which may point to lower development densities. The Report will present tactics to sustain GI developed, providing frameworks for necessary operation and maintenance. It will discuss resource needs, including possible ways to finance GI. It will present GI that can be beneficial for private landowners and discuss how to organize, assist, and implement efforts by property owners, with suggestions for advancing GI within development and on private property. It will also define how to provide future project monitoring and build support for implementing multiple GI capital projects, including if there is turnover in Village and Town Boards and staff.

Deliverables:

1. Implementation Strategies Report

Task 8: Formulate Draft GI Capital Improvements Feasibility Plan. This is another key product deliverable within the Project. Once Tasks 1-7 are substantially completed per contract milestones, with express authorization of the Village, the Consultant will prepare and compile the draft plan. Besides the content discussed above, the plan should have an executive summary that helps wrap-up the Project and its key findings, including by presenting the big picture for GI stormwater planning, overviewing conditions in different areas within the community and at particular focus locations. It will be responsive to local feedback provided up to that point of the Project. This draft plan would be reviewed by the Committee and the Village's Attorney, Engineer, and/or other Village consultants. Within two to four weeks of receipt of the draft plan, the Village will assemble and transmit to the Consultant written comments and questions which will be used by the Consultant for generation of the final plan product.

Deliverables:

1. Provide the Village for review, in electronic format, the draft proposed GI Plan.

Task 9: New Paltz GI Capital Improvement Feasibility Plan (Final Deliverable). Revisions to the draft report will address the Village's comments resulting in a final report. The resultant plan will be forwarded to the Village and/or Town Boards for their receipt and consideration. The plan may be approved by resolution of the Village and/or Town Boards.

Deliverables:

1. Provide quality assured/ quality controlled completed final plan the Village will use to confirm the product supplied meets expected standards as per the Project Contract and sufficiently addresses comments provided to the Consultant. The final plan with narratives, graphic, maps and attachments will be submitted as nine (9) hard copies, along with one fully readable and optical character recognizable PDF digital copy. Electronic copies of all content, including GIS shapefiles, MS Excel and Word, and all other data developed during the Project must also be transmitted in accessible formats to the Village without copyrights, trademarks, or any other limitations on the use of materials generated within the Project.
2. Make a presentation on the final plan at a joint meeting of the Village and/or Town Boards, and/or other municipal Boards and Commissions, along with the Committee.

Task 10: Steering Committee Meetings & Other Public Engagement Project Management/ & Project Administration. Group meetings will be used to build GI knowledge, define roles, and build interest in specific physical projects, establish consensus on goals and collaborate on site selection, feasibility analysis, and implementation of GI projects. It is anticipated the Consultant will need to attend at least three (3) Committee meetings, besides the kick-off, major outreach meeting, and the final presentation, so time should be budgeted for meetings attendance. One should involve a tour of potential GI sites with interested persons.

Under this task, time should also be budgeted for HREP's Project Manager to review and comment on deliverables and interim products like meeting designs, outreach materials, or plan elements. Yet, there will be an aim for efficiency in this regards, as the HREP's Project Manager is part of the Committee.

Deliverables:

1. Approval of Consultant refined public engagement plan for the Project (see Task 1)
2. Village approval of detailed design/ timeline for major meeting – Task 4.
3. Meeting agendas (one week prior to meetings);
4. Meeting handouts;
5. Meeting attendance sheets; and
6. One page meeting summaries.

End of Document Main Body

