

REQUEST FOR
CONSULTANT SERVICES

Economic Development Consultant

Town of Cortlandt
1 Heady Road, Cortlandt Manor NY, 10567



Prepared By

Town of Cortlandt
Department of Technical Services
Engineering Division
1 Heady Street
Cortlandt Manor, NY, 10567

Issue Date

10-30-2017

SUBMISSION DEADLINE

Wednesday November 22, 2017 at Noon

Pre Submission Meeting Scheduled for 11/09/2017 at 10 am

I. Introduction

The Town of Cortlandt (population 41,592), is seeking competitive proposals from qualified economic development and marketing consultants to assist the Town with Economic Development. The consultant would be responsible for the marketing of the Town of Cortlandt to investors and the business community as well as the coordination and implementation of Town economic development policies, activities, strategies and projects. The successful candidate will serve as an advisor to the Town Board, a liaison between the Town and business community, and will make policy recommendations to the Town Supervisor, Town Board, and Director of Technical Services (DOTS) which includes Planning and Development as well as engineering.

The anticipated annual budget for the consultant shall be a maximum of \$75,000 dollars. The consultant will be required to submit cost estimates for each of the proposed tasks which must be approved by the Town prior to the start of work. The Town will consider the proposal based on a qualification based selection see below **“Section X Basis of Selection.”**

Questions regarding this RFP should be submitted by 12:00 p.m. on November 10th, to Michelle Robbins, Assistant Planner micheller@townofcortlandt.com or by phone at (914) 734-1082. Any questions received by the Town that affect the RFP process will be issued as addenda by the Town.

Two (2) hard copies of the Proposals must be received no later than **Wednesday Nov. 22, 2017 by Noon.** The Proposal must be submitted in a sealed envelope addressed as follows:

Michael Preziosi, PE, Director
Department of Technical Services
Town Hall
1 Heady Street
Cortlandt Manor, New York 10567

The Town of Cortlandt reserves the right to reject any or all proposals in whole or in part. All proposals will remain valid for a period of forty-five (45) days after date specified for receipt of proposals. Upon mutual agreement between the Town and the Consultant the proposal may be extended.

II. Background

The Town is actively seeking to expand and diversify its tax base as a result of the economic challenges facing the Town of Cortlandt post the announcement of the closure of Entergy's Indian Point and to further the Town's economic goals outlined in the 2016 Sustainable Comprehensive Plan—*Envision Cortlandt*. *Envision Cortlandt* identifies four key planning and economic development initiatives which form the framework of the Town's economic development strategy.

- Waterfront Sustainability District (WSD)
 - Annsville Area
 - Hamlet of Verplanck
- Transit-Oriented District (TOD)
- Medical Oriented District (MOD)
- Cortlandt Boulevard Area (CBA)

A report summarizing some of the opportunities and constraints of each of the identified economic development areas has been included in **Appendix A**. The Town will initially focus its efforts on the Waterfront Sustainability District (WSD) and the Transit-Oriented District (TOD). These planning areas are located within the boundaries of the Hendrick Hudson School District which is expected to lose significant tax revenue as a result of the Indian Point closure.

The Economic Development Consultant will be expected to perform a variety of administrative, technical and professional work in preparation and implementation of economic and community development plans, programs, and services. The consultant will be responsible for working closely with the Town Board and town staff in promoting the business and economic development interests within the community.

III. Project Approach and Scope of Services

The Town will evaluate submissions to this RFP and select a qualified consultant whose written proposal is determined to be the most thorough, practicable and responsive. The Town reserves the right to interview any/all of the consultants prior to selecting a preferred respondent. Qualified consultants shall make their submission based on the following Project Approach and all other requested information in the sections below.

The Project Approach will include, but is not limited to the following:

1. Identify development guidelines including but not limited to, incentives, regulatory reform and zoning, elimination of split zones, and other potential regulatory reforms that may be required to attract economic development and investment.
2. Develop an implementation strategy and outreach program to attract investors/developers consistent with the goals of the following Town Planning Documents:

- a. *Envision Cortlandt – the 2016 Comprehensive Master Plan*
[http://www.townofcortlandt.com/documents/2016_mp/cortlandt%20master%20plan_021816%20\(2\).pdf](http://www.townofcortlandt.com/documents/2016_mp/cortlandt%20master%20plan_021816%20(2).pdf)
 - b. *Verplanck Waterfront Master Plan 2015*
http://www.townofcortlandt.com/Documents/Planning/Verplanck%20Waterfront%20Master%20Plan/2015-04-13_Verplanck%20Waterfront%20Master%20Plan.pdf
3. Work with the Town to prepare and solicit Requests for Proposals (RFPs) for a Master Development Plan in the four identified economic development areas (listed below) with emphasis on the areas within the Hendrick Hudson School District, which are listed in bold below.
- I. **Waterfront Sustainability District (WSD)**
 - a. **Annsville Area**
 - b. **Hamlet of Verplanck**
 - II. **Transit-Oriented District (TOD)**
 - III. Medical Oriented District (MOD)
 - IV. Cortlandt Boulevard Area (CBA)
4. Assist in identifying potential emerging businesses that could be attracted, while also assisting with business retention and backfill of vacant commercial properties.
5. Work with the Director of Technical Services to identify areas for potential infrastructure expansion and improvement to attract investment and possibly assist with the procurement of grants and other funding for development projects.
6. Develop and cultivate relationships with other Economic Development organizations such as Empire State Development Corp etc. to broaden economic development opportunities.
7. Provide projections that estimate the impact of new development to the equalized assessed value of properties and the expected level of tax revenue. These projections are used to help determine the amount of tax revenue that may be generated by certain development and the overall amount that may be available to fund development projects.

Market Analysis (Possible Future Additional Work)

If as part of the approach the consultant feels a market analysis is required to assess a proposed project's financial feasibility, benefits and impacts, a separate proposal shall be submitted to the Town for review and approval (**see Section V, Extra Work.**)

IV. Deliverables

In the RFP response, the consultant shall provide a description of their approach to economic development within the Town of Cortlandt. The consultant shall describe the product/services that would be appropriate for the Town of Cortlandt considering the four key planning and economic development initiatives described above in **Section II. Background**. The economic development strategy shall recommend potential deliverables and outline personnel skills and services that distinguish the consultant, incorporating appropriate staff profiles and their hourly fees. It is anticipated that a range of deliverables will be proposed by the firms that respond to the RFP. At a minimum, it is expected that the consultant would have the following responsibilities and would prepare the following reports depending on project need.

Responsibilities

- Provide direction and guidance for important project development that results in increased tax base.
- Lead Town staff in the development of on-target responses to potential business expansions.
- Interface with the Town Board and Town Staff to keep them apprised of pursuits and their status in an organized and consistent manner.
- Work internally with the Town Board, staff, and department leaders to share information critical to the success of business development activities.
- Research and implement best practice solutions that will enhance economic development projects, including a business retention and expansion program.

Reports

- **Developer Pro forma Analysis**

The Economic Development Consultant shall conduct Pro forma Analyses for communities pursuing redevelopment, helping them assess the appropriate level of need and developer assistance. This includes determining whether there may be a gap in funding that precludes private parties from earning a reasonable rate of return on their investment to market standards. If the answer is yes, the economic development consultant will quantify the public assistance needed and recommends limits.

- **Developer Identification, Selection, Negotiation and Agreement Implementation**

The Economic Development Consultant will assist the Town in the identification of potential commercial tenants and retail development options and create a defined process for their identification and selection.

- **Developer Negotiation and Agreement Implementation**

The Economic Development Consultant shall have extensive experience negotiating development agreements for a wide range of commercial, residential, and mixed-used projects. The Economic Development Consultant will be expected to provide recommendations and feedback to the Town on redevelopment agreements negotiated by others. Examples of recommendations would include:

- Amount, type, and timing of incentives or assistance to developers.
- Receipt of incentives geared toward performance.
- Incentives based on goals of municipality.
- Use of “Look Back” provisions in development agreements, so that if a project is more successful than projected, the developer returns funds to the municipality.

- **Tax Revenue Projections**

The Economic Development Consultant will provide projections that estimate the impact of new development to the equalized assessed value of properties and the expected level of tax revenue. These projections will be used to help determine the amount of tax revenue that may be generated by certain development and the overall amount that may be available to fund development projects.

V. Extra Work

In the event that extra work is required and not specified in the Contract, a supplemental agreement will need to be executed. Work performed by the Consultant without the express written consent of the Town will not be paid. The Consultant shall extend the prices previously agreed to in the Contract and as indicated in any requested fee schedule.

VI. Required Submittals

Proposals should include the following:

- **Firm History:** Firm background information that describes the nature and history of the firm including a representative list of past and current clients.
- **Project Approach and Scope of Services:** Project narrative and scope of services which shall include the tasks as outlined above and any other tasks the consultant would consider vital to the job.
- **Project Manager, Staff Resumes, and References:** Project Manager contact and resume, list of staff working on this project, resumes and three (3) references for your work, including if

applicable, the names and contact persons for any municipality for which services have been provided within the last five years.

- **Qualifications:** Specific information regarding the firm’s qualifications and technical expertise with respect to the scope of services, including descriptions of particular experience with economic development within a municipality.
- **Fee Schedule:** A fee schedule on an hourly basis for the types of services and personnel expected to perform the services. List travel costs and any other direct or indirect costs associated with performing the required services.
- **Proposed project schedule:** Provide proposed schedule based upon approach.

VII. Term of Contract

The Town anticipates entering into a contract with an Economic Development Consultant for a one (1) year term, renewable at the option of the Town for an additional one (1) year term within 30 days of the expiration of contract.

All information prepared for and provided to the Town of Cortlandt during this period shall become the property of the Town of Cortlandt and is subject to the Freedom of Information Law. “FOIL”

VIII. RFP Schedule

1. Proposal for Consultant Services released 10/30/2017
2. Pre-bid informational meeting November 09, 2017 at 10 am. Conference Room, 1 Heady Street, Cortlandt Manor, NY 10567. This is not a mandatory meeting but it is strongly encouraged to attend. Consideration will be given to allow firms to call in.
3. RFP Questions due back to Town of Cortlandt Monday, November 10th at 12 pm
4. **RFP due Wednesday November 22, 2017 by noon, standard eastern time.**
5. **11/29/17 – 12/8/17 interviews with Town Staff to be scheduled.**
6. **Monday December 11, 2017 at 7 pm work session, selected Consultants to interview with Town Board.**

The above dates are subject to change at the discretion of the Town of Cortlandt.

IX. Qualifications

Enclose with your proposal a portfolio of similar projects documenting your firm’s experience with economic development and marketing services for municipalities. All proposals shall include a section detailing the firm’s approach to providing economic development services to the Town of Cortlandt.

Please list contact person(s), phone number(s), and address(s). If you plan to subcontract any work related to this project please provide your team makeup with your proposal for approval by the Town of Cortlandt as well as similar experience documentation on the additional members.

- The selected Firm will devote as many people and man-hours to the work as necessary. The scope of work shall be performed under the direct supervision of key personnel identified as the “Project Team.” The Project Team shall be identified in your proposal. The Project Team shall include a “Project Team Manager” who is in overall charge of supervising and coordinating all the work. The Project Team shall devote sufficient time to the work to provide in-depth guidance, supervision, and analysis and to make all material decisions required. The “Project Team” shall carry out the scope of work for the duration of your Professional Services Agreement with the Town of Cortlandt. No member of the Project Team shall be removed from the work during the term of your contract except in extenuating circumstances beyond your control. You shall be expected to produce and provide for review suitable proof, documenting such a situation, acceptable to the Town of Cortlandt. This is a material term of the agreement. If a Project Team member does become unavailable to perform, due to the above, then you shall appoint a successor acceptable to the Town of Cortlandt. You must submit for the Town’s approval the current record of such a successor e.g. resume, qualifications and experience. If your firm fails to retain all member of the “Project Team” as submitted with your proposal, or appoint a successor acceptable to the Town of Cortlandt for reasons other than circumstances beyond your reasonable control, this shall be deemed a material breach of the agreement. If however, the Town of Cortlandt is dissatisfied with the performance of any of the Project team Members, and so notifies you in writing, you shall replace that member within 5 business days. The Town of Cortlandt shall only exercise this right with respect to Project Team Members for the betterment and advancement of the Project Goals.

X. Basis of Selection

The Town shall utilize the following criteria and weighted grading system as a basis in evaluating and determining the selection of the consultant.

- Firms History and Resource Capability 8 points max
- Project Approach and Scope of Services 30 points max
- Evaluation of Assigned Personal and Individual Experience 10 points max
- Qualifications/Related Firm Projects/Experience and Performance 12 points max
- Familiarity with local and regional economic development 5 points max
- Budget and Cost Control / Proposed Fee 15 points max
- Project Schedule 10 points max

The Selection Review Group shall consist of the Town's Director of Technical Services, Planning Staff and Town Comptroller.

After reviewing all proposals the Town of Cortlandt will schedule interviews with qualified Firms and prepare a list of no greater than three firms, to be considered for the final selection. These firms selected for the list shall then be required to present their proposals to the Town of Cortlandt Selection Committee and Town Board explaining the highlights and unique characteristics of the responding firm's project approach.

The presentations should have a maximum time limit of 45 minutes with a 15 minute question and answer period immediately following.

XI. Notice of Award

The Town of Cortlandt will evaluate and recommend to the Town of Cortlandt Town Board the proposal that meets the best interest of the Town of Cortlandt. Proposals will remain valid for a period of forty-five (45) days. Respondents will be notified of the results. The winning respondent will be given a written Authorization to Proceed prior to the placement of any work. The Town of Cortlandt reserves the right to reject any and all bids, to waive any informality therein, or to award the Contract to any Bidder if deemed to be in the best interest of the Town to do so.

In the event of any questions regarding this RFP please feel free to contact Michelle Robbins, AICP 914-734-1082 or 1060 or by email micheller@townofcortlandt.com

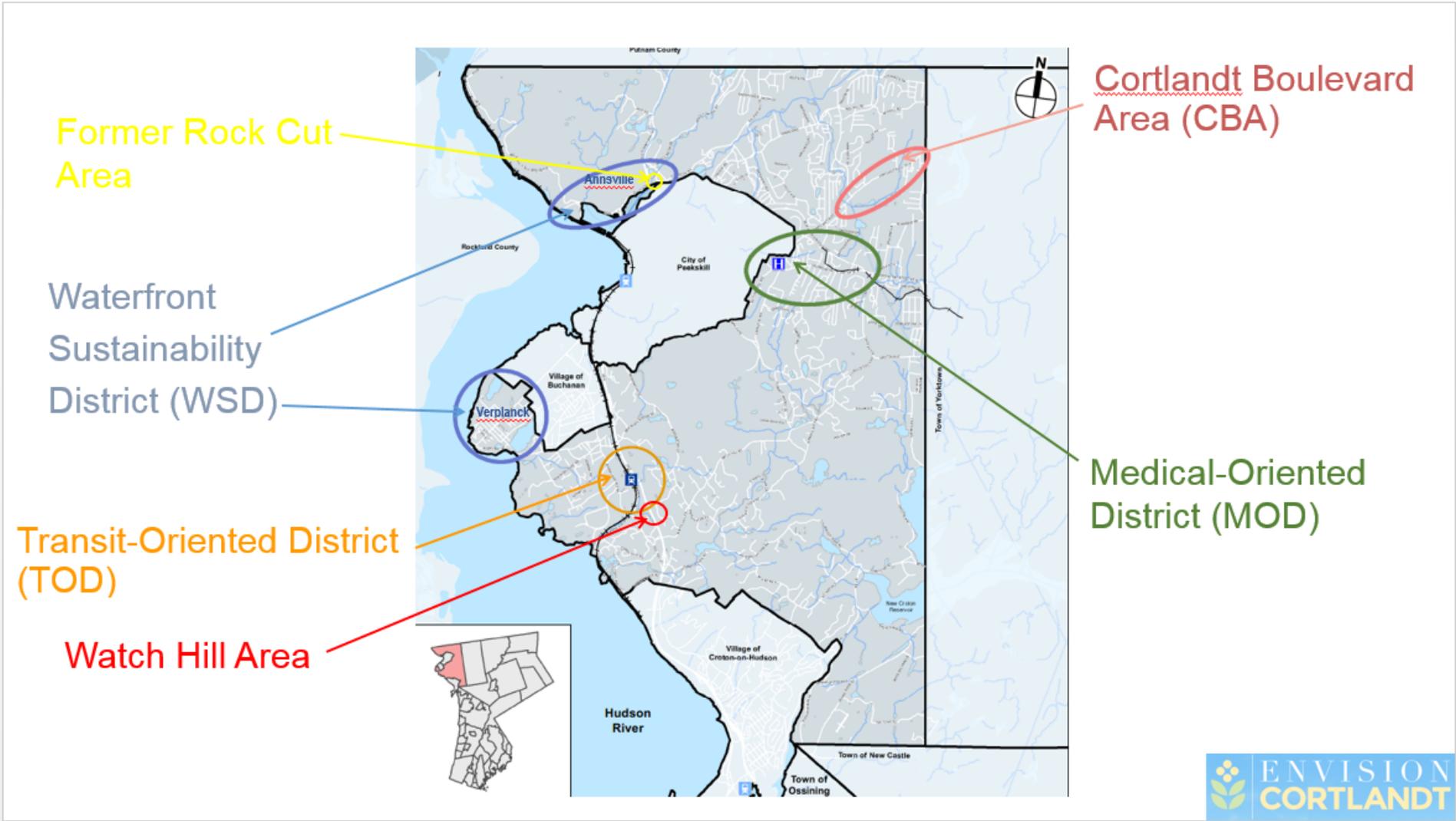
APPENDIX A

1. Key Planning Initiatives—Opportunities and Constraints

Four Key Planning Initiatives- Opportunities and Constraints

Town of Cortlandt

Four Key Planning Initiatives



Envision Cortlandt, the Town’s recently adopted comprehensive plan focused on four key planning strategies to create economic development opportunities for the Town. In addition we have identified two potential sub-areas. This memo summarizes the opportunities and constraints of each of the identified economic development areas:

- Waterfront Sustainability District (WSD) —Verplanck and Annsville Areas
 - Former Rock Cut Area
- Transit-Oriented District (TOD)
 - Watch Hill Area
- Medical Oriented District (MOD)
- Cortlandt Boulevard Area (CBA)

AREAS WITHIN THE HENDRICK HUDSON SCHOOL DISTRICT

Waterfront Sustainability District (WSD)

Opportunities	Constraints
Hudson River Access —Verplanck, Annsville	Requires Rezoning
Tourism <ul style="list-style-type: none"> — Hudson River — Historic Significance (e.g., Revolutionary War Sites, Tall Ships, etc.) — Ecotourism (Cortlandt Waterfront Park, crewing, Quarry Park, kayaking, other water sports, Env, Education Center) 	No sewer infrastructure
Walkability of Verplanck – existing sidewalks	Road network
Expansion of Sewer infrastructure	To be economically feasible this district would require higher density development than typically had been considered in Cortlandt
Several underutilized/vacant properties on or near the Verplanck and Annsville riverfronts	Residential Character of surrounding area
Synergies with the Cortlandt Waterfront Park and Quarry Park	
Existing Hamlet Center	
Former Rock Cut property	

Transit-Oriented District (TOD)

Opportunities	Constraints
Access to Metro-North and connecting transit	Requires Rezoning
Several existing vacant and underutilized parcels	No sewer infrastructure
Proximity to existing multi-family housing	Would likely require significant road improvements
Expansion of Sewer infrastructure	To be economically feasible this district would require higher density development than typically considered in Cortlandt
Located within the Hendrick Hudson School District	Need to relocate existing uses such as the Operating Engineers facility
Establishes mixed-use district/downtown area	Multiple property owners
Would create walkable, transit oriented district	
Watch Hill Area	
Close access to Metro-North Train Station	Requires Rezoning
Access off State Highway	No sewer infrastructure
No adjacent residential properties	Site Access
	Nearby residential neighborhoods

AREAS OUTSIDE THE HENDRICK HUDSON SCHOOL DISTRICT AND ALREADY CURRENTLY IN PROCESS

Medical Oriented District (MOD)

Opportunities	Constraints
Access to medical services, large employer	Requires Rezoning
Proximity to City of Peekskill and train station	Would require some water/sewer infrastructure improvements
Several existing vacant and underutilized parcels	Would require significant road improvements
Expansion of Sewer infrastructure	To be economically feasible this district would require higher density development than typically considered in Cortlandt
Two active development proposals	Residential character of surrounding neighborhoods
Large existing right-of-way on Route 202 allows for traffic and streetscape improvements	
Leverage NYPH investment in campus	
Several established residential neighborhoods within walking distance of MOD	

Cortlandt Boulevard Area (CBA)

Opportunities	Constraints
Existing commercial center	Traffic conditions and roadway capacity constraints on Route 6
Access to sewer and water infrastructure	Existing pattern of strip development makes it harder to create mixed-use development center
Bus transit opportunities	Not currently walkable or serviced by rail
Leverage new investment in Cortlandt Crossing	
Backfill vacancies along Route 6 (Shop Rite)	