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LONG ISLAND REGIONAL PLANNING BOARD



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Solicitation of Competitive Proposals

Long Island 2035 Sustainability Plan

Contact: Michael E White, Executive Director, Long Island Regional Planning Board

Proposal due: September 12, 2008

General Description: Sustainability Plan - Nassau and Suffolk Counties, New York

Introduction and Overview

The Long Island Regional Planning Board (LIRPB) is inviting proposals to develop a plan to secure the sustainable development of Long Island's economy and social and natural environment over the next 25 to 30 years. The scope of the plan is a comprehensive Island-wide review, under the leadership of the LIRPB and with the oversight of Nassau and Suffolk Counties, in collaboration with business, environmental, philanthropic, not-for-profit, civic and community leaders.

Issues to be studied include declining economic development, shortage of employment leading to upward mobility, aging and inadequate physical infrastructure, high energy costs, heavy local tax burdens, efficacy of our K through 12 education system, lack of affordable housing, an inadequate public transportation system, declining amount of open space, threats to the potable water supply, surface water and air quality, global climate change and geographical segregation of the population by age, income and race.

The goal of this solicitation is to engage a qualified consultant or team of qualified consultants to prepare a plan for Long Island along the lines of New York City's PlaNYC 2030, www.nyc.gov/html/planyc2030, which

addresses the sustainability of New York City. The Long Island 2035 Sustainability Plan should strive for regional equity as a core concern: such that all analysis and recommendations shall consider the entire region, including all communities and all people, and guard against policies and actions that will produce racial or class disparate impacts, or perpetuate racial or class segregation. The Plan should reflect awareness of the relationships between Nassau and Suffolk Counties and the New York Metropolitan region, particularly the need for coordinated sustainability plans to create a cleaner, greener, greater and more socially and economically equitable Long Island and New York Metropolitan area.

Project Objectives:

The objectives of the Long Island Sustainability Plan initiative include:

1. Identify, analyze and address the pressing economic, environmental, social and quality of life issues facing the Long Island community, including:

- Strength and outlook of the economy – market outlook, economic value-added by industry, mix of jobs, soundness of competitive basis, corporate attraction, growth outlook, fostering investment of venture capital and “incubating “ technology that creates jobs, increased income and economic growth on Long Island.
- Energy – existing and new infrastructure, sustainability, diversity and reliability of supply(electrical generating capacity/natural gas/petroleum), air quality and greenhouse gas/climate change impact, use/efficiency and conservation opportunities, likely future costs and the role of renewable energy sources.
- Transportation – public/mass transit (i.e. rail, bus etc.) and individual (roadway) transportation, access, transportation management, traffic safety, reducing congestion and infrastructure.
- Housing base – identification of sites for density of development, “smart growth” opportunities, downtown redevelopment, transit oriented development, rental housing, senior housing, workforce housing and next generation housing.

- Population -- brain drain-loss of young adults, supply of educationally-appropriate workers by sector, move ins/move outs (migration), accommodating population growth and changing demographics.
- Water resources/potable water supply -- aquifer preservation, reclamation and recharge, over pumpage and saltwater intrusion, sanitary waste, industrial waste, pesticide/fertilizer and spill contamination, need for wastewater collection system expansion, wastewater treatment facility expansion and renovation, new treatment technologies, protection/restoration of rivers, bays and harbors.
- Open space/natural resources preservation – accommodating population density, land use and zoning policies, reversing sprawl, Brownfields redevelopment, land acquisition, habitat protection, parklands and public amenities.
- Solid waste management – current handling and disposal practices, financial and environmental benefits of alternative practices, new technologies, increased recycling and markets for recyclables and solid waste as a renewable energy source.
- Tax base and cost-efficiency of the existing government structure – rational alternatives to the existing organizational and tax structure, complexity, cost of overlapping jurisdictions, structural inefficiencies of government formats, shared services.
- Social and economic equity/community values- policy and structural decisions that are contributing to the perpetuation of concentrated poverty, failing schools and segregation of our population by age, income and race and what new policies, practices and structures could be put in place to result in positive change – to meet the needs of Long Island’s poor and underserved population, improving social equity and diversity. What motivates a family to live on or leave Long Island?

2. Provide a thorough review and analysis of each of the issues identified and addressed in the Project Objectives presented herein to describe and explain the policies, practices, systems and structures that are shaping the future of Long Island and isolate the most important intervention points – both near-term and

longer-term -- to move the Island toward a sustainable future, including;

- Develop “no action” scenarios to demonstrate what is likely to happen to Long Island without strong and timely intervention (e.g., the effect of reaching full “build out” on the present path).
- Analyze the opportunity to address traffic congestion on Long Island, including the promotion and development of public transportation, opportunities for improvements to highway efficiency and the incorporation of smart growth principles in all development and redevelopment.
- Examine opportunities to simplify government structures and reduce associated costs (and tax burden) through redistributing public service responsibilities, shared services or consolidating redundant units, with a particular emphasis on “special districts” and school districts.
- Determine the factors that contribute most to the vitality of the Long Island economy and understand how to stimulate them (e.g., business mix, market dynamics, obstacles to “export” market competitiveness-overall economic growth).
- Determine the factors that contribute most to quality of life for Long Islanders and understand how to stimulate them (e.g., open space, natural resources, parks, entertainment and cultural facilities, waterfront activities, other public amenities), change to policies, practices and structures that will result in economic and social equity.
- Determine the factors that will help Long Island respond to the challenge of global climate change (e.g., LEED building/building retrofit standards, renewables, conservation and energy efficiency, new energy infrastructure, new appliance standards, bio-fuel availability, adaption).
- Form and test a series of intervention scenarios respecting the opportunities and factors outlined herein above as well as the Project Objectives outlined in Section 1 for sequence, cost and impact.
- Understand the relative roles of each stakeholder (including the state, local and federal governments) in each intervention scenario.

3. **Synthesize, prepare and deliver a written Long Island 2035 Sustainability Plan for adoption by the LIRPB and consideration by all relevant stakeholders. Present and characterize program goals and initiatives in terms of scope of action (which level(s) of government need to act), likely effectiveness, cost, funding sources, near-term feasibility and long term effectiveness.**
4. **Coordination of municipal approvals and funding: Tie in initiatives that will require either approval or active support from the state, local and/or the federal government, including financial support. In addition, some program initiatives will require actions by town, village and/or city governments and actions by leading unrelated public or private institutions (e.g., universities, research centers, business groups, and associations).**
5. **Integration of the New York Metropolitan Transportation Council (“NYMTC”), the Metropolitan Planning Organization in which Nassau and Suffolk Counties participate, project entitled; Long Island 2035: Building Public Consensus around a Sustainable Future Project.** The LIRPB, Nassau and Suffolk Counties have begun a regional visioning project funded by NYMTC through the University Transportation Research Center to create a receptive environment for new approaches to regional planning with an emphasis on integrating transportation planning and land use. The prime goal of Long Island 2035 is to develop a broader public consensus for a shared vision of where the next generation of residents should be housed, the transportation systems needed to support these settlements, and the institutional actions required to ensure that prosperity is broadly and equitably shared. Phase I of the project is underway and looks to achieve the following outcomes:
 - Presenting a statement of guiding principles and evaluation benchmarks.
 - Production of maps, projections and narrative reports to demonstrate the implications of current trends.
 - Design of a public education strategy.
 - Develop tools to assist in evaluation of local planning efforts.

- Present recommendations from a region-wide consensus building workshop.

The Phase II effort of the LI 2035 Project will launch a broad public dialogue and produce the following;

- An extensive public education campaign that includes media outreach, public forums and web-based communication.
- A series of workshops that will facilitate a dialogue on choice for future growth and development.
- A preferred vision and growth strategy that would include identification of targeted development and redevelopment locations.
- An action plan outlining steps for implementation of the Long Island 2035 Sustainability Plan.

The Long Island 2035 project contemplates a third phase as an ongoing effort to move the initiative from the Long Island 2035 Sustainability Plan from the planning stage to implementation.

The LIRPB views the Long Island 2035 project as an integral component of its sustainability program. It is anticipated that Phase I will be at or close to completion as the work on the broader Long Island 2035 Sustainability Plan gets underway. Therefore the work product of Phase I will serve as a critical foundation for the Long Island 2035 Sustainability Plan. The Long Island 2035 Sustainability Plan must fully integrate the NYMTC/UTRC Phase II and Phase III scope of work, producing a final work product complemented by launching a broad public dialogue on a preferred vision and growth strategy arising out of the Long Island 2035 Sustainability Plan and establish an on-going effort to move the resulting Long Island 2035 Sustainability Plan initiative from the planning stage to implementation.

Mandatory Pre-Proposal Meeting:

The LIRPB will hold a mandatory Pre-Proposal Meeting on July 23, 2008 at 10:00am at its offices at 1864 Muttontown Road, Syosset, NY

The purpose of the meeting will be to present information about the Long Island 2035 Sustainability Plan subject of this solicitation and provide any necessary clarifications in response to questions that may be raised by attendees/potential proposers. The meeting will also encourage exchange of information by and among potential proposers regarding their respective areas of expertise. Participation in the Pre-Proposal Meeting is mandatory for any entity wishing to submit a proposal in response to this Solicitation for Competitive Proposals. All entities considering submission of a proposal are requested to register with the LIRPB by an email communication to the LIRPB contact listed herein, to assure receipt of communications and any amendments or clarifications to this Solicitation for Competitive Proposals.

Proposal Submission Instructions:

Proposals should be concise and include, but not be limited to: (i) the proposer's methodology for completing each phase of the project; (ii) a list of personnel, with accompanying resumes, to be devoted to the project; (iii) timing of the various phases of the project and completion date. Proposals must include a list of projects, with supporting reference and contact information for clients for whom the proposer has completed a comparable plan. In addition, proposers must submit a cost proposal in the form of the "Cost Proposal Sheet" and likewise will be required to complete and submit a "Business History Form", provided by the LIRPB, as part of this Notice/Solicitation. Proposals must not only set forth in detail the tasks to be undertaken by the proposer, but also the assistance the proposer will need from the LIRPB for the timely completion of the project. Proposers should identify any portions of the proposal that are confidential or proprietary, or that contain trade secrets. Specifically, proposers should identify any portions of materials that they wish to be exempt from disclosure under applicable law, including but not limited to the New York State Freedom of Information Law ("FOIL"), and should separate information deemed confidential, proprietary, trade secrets, or FOIL-exempt material from the non-confidential sections of the proposal. In the event that LIRPB determines that the law requires that confidential information be disclosed, LIRPB will notify the proposer so that it may take whatever steps it deems appropriate.

The proposals must be signed by an individual who is authorized to bind the proposer to all commitments made in the proposal. The original and

eighteen (18) copies of the proposal, together with all attachments, must be submitted to the LIRPB in a sealed envelope no later than 4:00 p.m. EST on September 12, 2008. No electronic or facsimile copies of the proposals will be accepted. Any late proposals will be returned unopened. Proposals received after the above date and time will not be considered. The LIRPB shall be under no obligation to return proposals. The LIRPB shall not be responsible for any costs for preparation or submittal of proposals. The LIRPB shall not be required to award this contract to any proposer should it, in its sole discretion, determine such proposal (s) to not be in the best interest of the LIRPB or Nassau and Suffolk Counties.

The LIRPB is under no obligation to respond to any question, inquiry or assertion that is not received in writing. Interested parties may contact the authorized contact person listed below by telephone to advise that a fax transmission or email has been sent to his attention. Proposers will submit all proposals and direct all responses, questions, and any other communications to the following authorized contact person:

Michael E. White, Executive Director
Long Island Regional Planning Board
1864 Muttontown Road
Syosset, NY 11791
Telephone: (516) - 571-7613
mwhite@nassaucountyny.gov

No contact with any other LIRPB, Nassau County or Suffolk County personnel other than the authorized contact person is allowed until such times as an award (or awards) has (have) been made. Violation of these provisions may result in immediate disqualification.

General Information:

1. **Incurring Cost.** The LIRPB shall not be liable for any costs incurred in the preparation and production of a proposal in response to this Request for Proposal (“RFP”) or for any work performed prior to the issuance of a contract.
2. **Rejection of Proposals.** This RFP does not commit the LIRPB to award a contract, or to procure, or to contract for services or supplies.

Notwithstanding any other provisions of this RFP, the LIRPB reserves the right to award this contract to the vendor(s) that best meet the requirements of the RFP, and not necessarily to the lowest proposer. The LIRPB reserves the right to accept or reject any or all proposals received as a result of this request; to negotiate with all qualified sources; or to cancel in part or in its entirety this RFP if it is in the interests of the LIRPB to so do.

The LIRPB may require the Proposer selected to participate in negotiation and to submit any price, technical, or other revisions, or their proposals as may result from negotiations.

3. **Addenda to Request for Proposals.** Amendments to this RFP may be necessary prior to the closing date and will be furnished by mail to all prospective Proposers who have requested these materials.
4. **Contract Negotiations.** The LIRPB intends to enter into contract negotiations with the firm or firms selected by its RFP Evaluation Committee, who shall be required to enter into a written contract with the LIRPB in a form approved by legal counsel for the LIRPB. The contract usually includes, without limitation, the standard clauses set forth in Appendix "E" attached hereto. This RFP and the proposal, or any part thereof, may be incorporated into and made a part of the contract. The contract may contain provisions not contained herein.

The LIRPB reserves the right to negotiate the terms and conditions of the contract with the selected proposer(s), if any. These negotiations could include all aspects of services and fees. Neither the selection of a vendor nor the negotiation of the contract with such vendor(s) shall constitute the LIRPB's acceptance of the proposal or a binding commitment on behalf of the LIRPB to enter into a contract with such vendor(s), as any binding arrangement must be set forth in the contract signed by both parties and is subject to all requisite approvals.

The contract shall provide that in the event of any material misrepresentation by the Proposer contained in its proposal, the LIRPB shall have the right to immediately terminate the agreement. It shall also provide that in the event the Proposer or any of its principals are convicted of a misdemeanor or felony during the term of the agreement, that the LIRPB shall also have the right to terminate the agreement

5. **Additional Information.** The LIRPB may award a contract based upon offers received without discussion of such offers with the Proposers. Each offer, therefore, should be submitted in the most favorable terms that the Proposers can offer the LIRPB from a price and technical standpoint. However, the LIRPB reserves the right to request additional data or oral discussions or presentations in support of written proposals from any and all of the Proposers. In addition, the LIRPB reserves the right to make on-site visits to the Proposer's place of business to assess and/or evaluate Proposer's qualifications.
6. **Disclosure of proposal contents.** The LIRPB will withhold proposals submitted under this RFP from disclosure, unless otherwise required by law, including, but not limited to, the Freedom of Information Law ("FOIL"). Proposers shall indicate in their proposals any information they submit that they believe is exempted from disclosure under FOIL. In the event that the LIRPB determines that information is required by applicable law to be disclosed, the LIRPB will notify the Proposer in advance of such disclosure to enable the Proposer to take such action as it deems appropriate. Copies of executed contracts are not exempt from FOIL.
7. **Independent Price Determination:** By submission of its offer, the Proposers certify (and in the case of a joint offer, each party thereto certifies as to its own organization) that, in connection with procurement:
 - A. The prices in this offer have been arrived at independently, without consultation, communication, or agreement for the purpose of restricting competition, as to any matters relating to such prices with any other proposer or competitor; and
 - B. Unless otherwise required by law, the prices which have been quoted in this offer have not been knowingly disclosed by the Proposers prior to award, directly or indirectly, to any other Proposer or competitor; and
 - C. No attempt has been made or will be made by the Proposer to induce any other person or firm to submit or not to submit an offer for the purpose of restricting competition; and
 - D. No elected or appointed official or employee of the LIRPB shall benefit financially or materially from this contract. The LIRPB may terminate this contract if gratuities were offered or given by

the Proposer or his or her agency to any such official or employee.

8. **Ownership of Information:** All materials submitted in response to this RFP will become the property of the LIRPB.
9. **Examination of Records:** In submitting a proposal, the successful Proposer agrees that the LIRPB shall have access to and the right to examine directly all pertinent documents, papers and records of the Proposer and/or any sub-proposer as related to any contract and/or subcontract resulting from this RFP until six years after final payment has been made pursuant to any contract awarded as a result of the LIRPB's acceptance of proposal.
10. **Subcontracting:** The Proposer will be responsible for the entire contract performance. The Proposer must indicate in the RFP if it intends to use a sub-contractor for any part of the work and provide full disclosure of the entire consultant team at the time of submittal of a proposal. The Proposer shall identify each sub-contractor by name, business address and expertise, and must include the name(s) of the principal(s) of the subcontracting entity. A full description of the tasks to be performed by the sub-contractor must be included. The Proposer will not be permitted to subcontract any part of the contract or any of the rights and obligations thereunder without the prior written approval of the LIRPB.
11. **Negotiated Changes:** In the event that negotiated changes occur after the awarding of the contract, the same pricing policies called for in the original contract will remain in effect.
12. **Disclaimer:** The LIRPB and its respective officers, directors, agents, members and employees make no representation or warranty and assume no responsibility for the accuracy of the information set forth in this RFP. Further, the LIRPB does not warrant nor make any representations as to the quality, content, accuracy or completeness of the information, text, graphics, links or other facet of this RFP once it has been downloaded or printed from this or any server, and hereby disclaims any liability for technical errors or difficulties of any nature that may arise in connection with the Website on which this RFP is posted, or in connection with any other electronic medium utilized by respondents or potential respondents in connection with or otherwise related to the RFP.

Evaluation Criteria: Proposals submitted to the LIRPB will be evaluated using the following criteria.

Proposal elements, as described above, will be reviewed and evaluated for completeness and responsiveness according to pre-determined standards and selection criteria. Proposals will be deemed responsive only if the proposer responds to and meets all of the requirements of this RFP. Proposers may be invited for interviews to discuss project requirements and proposal elements in more detail should the selection committee request such. The LIRPB reserves the right to award all or any part of this project, and to waive any technical irregularities or omissions, or to cancel this RFP and solicit new proposals if, in the LIRPB's sole judgment, the best interests of the LIRPB will be served. An Evaluation Committee designated by the LIRPB will evaluate each proposal and use the following criteria (which will be given approximately equal weight) for scoring each submission:

- Demonstrated capability in the preparation of comparable reports, specifically projects on behalf of similar regions of comparable size and population density of Nassau and Suffolk Counties, and with populations of no less than two million.
- Price and methodology of fee proposal for all services; including a detailed proposal that includes hourly rates for all staff to be assigned to the project as well as rates for disbursements.
- Technical experience and qualifications in all subject areas required to be addressed and excellence in the preparation of reports.
- Management capability, including data about the proposer (such as size, corporate structure, financial report) and qualifications and experience of key project staff members.
- Ability to complete the project within nine months of the contract award, with periodic benchmarks demonstrating substantial progress.

- Experience of the consultant team, to include the lead contractor and any subcontractors; including proven ability to work in concert with one another and with the project sponsor.