

# Work Plan / Task 3 – Selection of consultant(s)

## SUMMARY NOTES

AUGUST 21 – OCTOBER 24, 2023

Village Office in-person

<b>MEETING CALLED BY</b>	Sally Baker – PBI Project Management
<b>ATTENDEES</b>	BOA Grant Committee. See lists for selection meetings 8/29, 9/26, 10/11, 10/18, & 10/24 and RFQ attachments.

### Agenda topics

<b>DISCUSSION</b>	<b>Protocol of RFQ (Request for Qualifications) – meeting 8/29/23 Review of 1<sup>st</sup> Draft of RFQ</b>		
<b>CONCLUSIONS</b>	Meeting discussed the procedure of Request for Qualifications (RFQ) – publishing and evaluation procedure.  See attachments – Agenda, Attendees list		
<b>ACTION ITEMS</b>	<b>PERSON RESPONSIBLE</b>	<b>DEADLINE</b>	
Receive approval to publish from DOS	PBI	9/1/23	

<b>DISCUSSION</b>	<b>Publishing of RFQ (Request for Qualifications)</b>		
<b>CONCLUSIONS</b>	The Request for Qualifications (RFQ) was drafted by PBI on 8/21/23, it was approved by BOA Committee on 8/29/23 and approved by the Dept of State (DOS) on 9/5/23 to publish on 9/11/23.  See attachments of RFQ publication.		
<b>ACTION ITEMS</b>	<b>PERSON RESPONSIBLE</b>	<b>DEADLINE</b>	
1. Village Clerk to publish RFQ on the New York State Contract Reporter on 9/8 for a 9/11 publication.	PBI & Village Clerk	9/11/23	
2. PBI to provide copy to Village website manager, Trustee Debra Gitterman to publish 9/11.	PBI		
3. MWBE Directory search – individual firms solicitation by email, email search to DOS.	PBI		

<b>DISCUSSION</b>	<b>1<sup>st</sup> set of Q&amp;A published on Village website 9/15/23</b>		
<b>CONCLUSIONS</b>	The Village of Philmont and PBI received several emails from interested firms consisting of questions in response to the RFQ.		

In accordance with the RFQ, responses to questions submitted were published on the Village website on 9/15/23.		
See Attachment		
ACTION ITEMS	PERSON RESPONSIBLE	DEADLINE
PBI provided copy of Q&A to village webmaster to publish on Village website.	PBI Village webmaster	9/15/23

DISCUSSION	<b>Evaluation worksheets for RFQ (Request for Qualifications) meeting 9/26/23</b>	
CONCLUSIONS	<p>Evaluation worksheet was drafted by PBI on 9/24/23 – emailed to BOA Committee members. Reviewed and approved by BOA Committee in meeting held on 9/26.</p> <p>BOA Committee meeting 9/26. – Review of evaluation sheet and discussion of protocol to be followed for evaluation of responses to RFQ.</p> <p style="text-align: center;"><b>See attachments for 9/26 meeting</b>                      Evaluation worksheet (pdf fillable)                      Meeting Agenda for 9/26                      Timeline for selection process (published in RFQ)                      Development Community Center - Julie Verezoni 3-8-22</p>	
ACTION ITEMS	PERSON RESPONSIBLE	DEADLINE
N/A		

DISCUSSION	<b>Receipt of consultant responses to RFQ (Request for Qualifications)</b>	
CONCLUSIONS	<p><b>RFQ responses received at Village Office 9/29/23</b></p> <p>Responses to the <a href="#">Request for Qualifications</a> (RFQ) published on the Village website and the State Contract Reporter were received from 12 Architectural and Landscape Architectural firms operating in NYstate on 9/29/23 by the RFQ deadline for 2:00pm for submissions.</p> <p>Each response consisted of 1 digital file submitted to a designated DropBox and 2 printed brochures of the response to RFQ delivered to Village Office by each submitting firm by the deadline for submissions.</p>	
ACTION ITEMS	PERSON RESPONSIBLE	DEADLINE
PBI emailed BOA Committee members and the Village	PBI	9/29/23

Clerk at 2:02pm with the link to the uploaded DropBox to download the responses submitted.		
See attachment.		

<b>DISCUSSION</b>	<b>BOA Committee members review of submitted responses to RFQ 9/29- 10/11/23</b>	
<b>CONCLUSIONS</b>	Each member of the BOA Committee performed 1 <sup>st</sup> review of responses to RFP in their own time to be prepared for evaluation meetings.	
<b>ACTION ITEMS</b>	<b>PERSON RESPONSIBLE</b>	<b>DEADLINE</b>
1 <sup>ST</sup> evaluation of responses by BOA Committee members in their own time using evaluation worksheet.	BOA Committee PBI	10/11/23

<b>DISCUSSION</b>	<b>BOA Committee meeting 10/11/23 – evaluation of RFQ responses</b>	
<b>CONCLUSIONS</b>	Three evaluation worksheets were submitted by Committee members to review and discuss in the 10/11/23 meeting.	
<b>ACTION ITEMS</b>	<b>PERSON RESPONSIBLE</b>	<b>DEADLINE</b>
Continued review of RFQ submissions by Committee members.	BOA Committee	10/18/23

<b>DISCUSSION</b>	<b>BOA Committee meeting 10/18/23</b>	
<b>CONCLUSIONS</b>	Two additional evaluation worksheets were submitted by Committee members to review and discuss in the 10/18/23 meeting.	
<b>ACTION ITEMS</b>	<b>PERSON RESPONSIBLE</b>	<b>DEADLINE</b>
Continued review of RFQ submissions by Committee members.	BOA Committee	10/24/23

<b>DISCUSSION</b>	<b>BOA Committee meeting 10/24/23</b>	
<b>CONCLUSIONS</b>	One additional evaluation of 1 <sup>st</sup> , 2 <sup>nd</sup> and 3 <sup>rd</sup> choice was submitted by Committee member to review and discuss in the 10/24/23 meeting for final selection.	
<p>Final discussion for selection of 1<sup>st</sup>, 2<sup>nd</sup>, and 3<sup>rd</sup> choice consisted of each of the six Committee members presenting and fully discussing their final choices in a roundtable format.</p> <p>The final selection consisted of a roundtable format for each Committee member to enter into the meeting record for their final choices.</p> <p><b>Final choices were recorded in the meeting as follows:</b></p> <p>Rice+Lipka Architects and Starr Whitehouse Landscape Architects as a two-firm team – 5 members listed as 1<sup>st</sup> choice.</p> <p>LVF Landscape Architects and AtelierTek Architects as a two-firm team - 4 members listed as 2<sup>nd</sup> choice.</p> <p>ALAO and SYLA as a two-firm team – 4 members listed as 3<sup>rd</sup> choice.</p> <p style="text-align: center;">See attachment of 10/24/23 meeting Agenda</p> <p>The selection decisions were based on the evaluation worksheets that asked member to evaluate and substantiate their decisions in writing for each RFQ submission based on the criteria published in the RFQ consisting of:</p> <ul style="list-style-type: none"> <li>a) Consultant Qualifications (experience with similar projects, ability to work with municipalities to attain desired outcomes, and knowledge of the topic) - 85%, including:</li> <li>b) Experience with producing next level design concepts for municipal sites, including small community centers, parks with playgrounds, waterfronts, and multi-use downtown plazas,</li> <li>c) Ability to effectively partner with diverse community-based volunteer Working Groups,</li> <li>d) References of BOA pre-development projects or similar projects,</li> <li>e) Understanding of the prior community outreach and how to utilize the outcomes as building blocks for the project,</li> <li>f) Proven ability to work with committees and conduct public meetings,</li> <li>g) Availability to begin work on project start date,</li> <li>h) Quality, completeness, and clarity of submission - 15%,</li> <li>i) MWBE firms – 5%.</li> </ul>		
<b>ACTION ITEMS</b>	<b>PERSON RESPONSIBLE</b>	<b>DEADLINE</b>
<ol style="list-style-type: none"> <li>1. PBI to send BOA Committee email by 10/25/23 of list of final Committee choices recorded in meeting dated 10/24/23.</li> <li>2. PBI and Barbara Sagal to schedule and hold Zoom meeting with the two-firm team of Rice+Lipka Architects and Starr Whitehouse Landscape Architects as the BOA Committee’s 1<sup>st</sup> choice to discuss potential contract for professional Services as 1<sup>st</sup> choice. If the contract negotiations fail – the process then engages the 2<sup>nd</sup> choice and so forth until the 3<sup>rd</sup> choice.</li> </ol>	<p>PBI</p> <p>Barbara Sagal / Co-chair of Village BOA committees</p>	<p>10/25/23</p>

<b>DISCUSSION</b>	<b>Contract meeting with Rice+Lipka Architects and Starr Whitehouse Landscape Architects – meeting 11/1/23</b>



<b>CONCLUSIONS</b>		
Zoom meeting was held on 11/1/23 from 12noon-1.30pm attended by the principals of both firms with PBI and Barbara Sagal Co-chair of BOA Committee projects.		
Scope of work for BOA Subarea 1 (Community Center / Playground), and Subarea 2 (Canal Street area), required public outreach meetings, budget, timeline, procurement contract requirements, and MWBE requirements were discussed.		
<b>ACTION ITEMS</b>		
<b>ACTION ITEMS</b>	<b>PERSON RESPONSIBLE</b>	<b>DEADLINE</b>
1. Rice+Lipka to draft a standard architectural contract for review by DOS and Village attorney to advise the Mayor and Village BOT for procurement certification.	Rice+Lipka PBI / Project Management.	(12/1/23)
2. PBI to send email to BOA Committee of 11/1/23 meeting outcomes.		11/1/23
3. PBI to draft Press Release. Obtain DRAFT approvals from DOS, Mayor of Philmont, Rice+Lipka, email to BOA Committee.	PBI	11/10/23
4. Provide materials to Village webmaster	PBI	11/16/23
5. Notice all firms of 1 <sup>st</sup> choice selection		
6. Publish Press Release.	PBI / Village Clerk	11/20/23



*This report was prepared with funding provided by the New York State Department of State under Title 11 of the Environmental Protection Fund.*

NYS Department of State - Office of Planning, Development and Community Infrastructure

**Attachment**

**This timelog showing daily time distribution, signed by the oversight individual MUST be submitted with Payment Request Forms.  
For use when a group of volunteers are completing similar tasks at project meetings and events.**

Contract #:	C1001687 - BOA					
Description of services performed (including specific project tasks):	<b>Task 3 of BOA grant Work Plan</b> - Consultant Selection and Compliance with Procurement Requirements					
Date	Selection process 8/29/ - 10/24/23					
BOA Committee	Mayor Johnson, Chair, Bob Macfarlane, Co-Chair, Barbara Sagal, Chair Agawamuck Creekc Watershed Committee, Mark Rowntree, community lead of Subarea 1 Working Group, Karen Schoemer, David Bolevice, Board member of Philmont Library, Sally Baker, Philmont Beautification, Inc, Project Management.					
Name and Title of Oversight Individual:	Sally Baker, Project Management, Philmont Beautification, Inc.					
Signature of Oversight Individual:	Sally Baker			Date: 11/16/23		
By signature, I certify that this time log represents an accurate representation of hours worked towards completion of tasks related to the contract listed above.						
<b>TOTAL HOURS:</b>				<b>67.25</b>	<b>TOTAL:</b>	<b>\$ -</b>
Time In	Time Out	Name of Each Volunteer (including Organization, if applicable)	# of Hours	Volunteer Rate	Amount (includes local match)	
7.00pm	8.15pm	Mayor Johnson, 8/29, 9/26, 10/11/, 10/18	5	None		
7.00pm	8.15pm	Bob Mcfarlane 8/29, 9/26, 10/11, 10/18, 10/24	6.25	None		
7.00pm	8.15pm	Barbara Sagal 8/29, 9/26 10/18, 10/24	5	None		
7.00pm	8.15pm	Mark Rowntree 9/22, 10/18, 10/24	3.75	None		
7.00pm	8.15pm	Karen Schoemer, 8/29, 9/26, 10/11, 10/24	5	None		
		Sally Baker, 8/29, 9/26, 10/11, 10/18, 10/24	6.25			
Review of 12 RFQ responses	Homework	Average time by each Committee member - 6 hours each x 6	36	None		

\*\*All records must be maintained at the Recipient's official place of business for a period of 6 years following the last contract transaction, which is generally the final payment.

## **BOA CO-CHAIR MEETING**

DATE: 29 August, 2023 – 7pm – Village Office in-person meeting

Mayor Brian Johnson – Village Co-Chair

Bob Macfarlane – Village Co-Chair

Sally Baker – PBI – Project Management

Barbara Sagal – LWRP Chair of Advisory Committee (WAC)

Subarea 1 Working Group community participation: Mark Rowntree, David Bolevice,  
Karen Schoemer

### **AGENDA**

#### **1. Review BOA RFQ**

- a) Aiming at Sep 5th for release.
- b) Have not received comments yet from DOS. Can not publish RFQ without DOS approval of draft.
- c) Plan is to ask Village to upload all documents to website

#### **2. Update on LWRP**

- a) The first chunk of substantial scope of work by LaBella will be presented in WAC meeting scheduled for September 13.
- b) It will then go to DOS for comments.
- c) We will be working towards 1<sup>st</sup> chunk to be presented to the general public in an open house meeting. More than likely, that presentation will take place online or in-person by LaBella at a location in the towns participating.

#### **3. Update on Historic District**

- a) Letter from the Mayor – DRAFT – review
- b) SHPO are producing the final map of the Historic District.
- c) Letter to property owners will be mailed by PARKS in the 1<sup>st</sup> week of October  
It will attach the letter from the Mayor and the new map.
- d) Public Hearing – scheduled for Village Hall – Tuesday Nov 14 at 7pm
- e) Heritage Working Group to stage a pop-up tent to inform Philmonters of public hearing.
- f) Beginning to gather photos of Historic District signage – where should this sign be placed? Should it contain a brief description of Philmont's history and list funders who made the nomination possible?

Adjourn



# The New York State Contract Reporter

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Friday, 09/08/2023

## Contracting Opportunity

\*\*\* This ad has not been published. It has been reviewed and pending publication. \*\*\*

**Title:** RFQ: Architectural Design Services  
**Agency:** Philmont, Village of  
**Division:** Administration  
**Contract Number:** Contract # C1001687  
**CR Number:** 2101754  
**Contract Term:** Contract Term: 12 months  
**Date of Issue:** 09/11/2023  
**Due Date/Time:** 10/02/2023 2:00 PM  
**County(ies):** Columbia  
**Location:** Village of Philmont  
**Classification:** Architectural, Engineering & Surveying - *Construction Professional Services*  
**Opportunity Type:** General  
**Entered By:** Jessica Thomas  
**Description:** Request for Qualifications for next level concept designs for two selected sites:  
a) Architectural Design Concepts for Waterfront park, playground, and community center on the bank of Summit Lake.  
b) Architectural Design Concepts for Canal St. Parking Lots and Community Plaza.  
**Service-Disabled Veteran-Owned Set Aside:** No  
**Business entities awarded an identical or substantially similar procurement contract within the past five years:**  
none

## Contact Information

**Primary contact:** Philmont, Village of  
Administration  
Jessica Thomas  
Clerk/Treasurer  
124 Main Street  
P.O. Box 822  
Philmont, NY 12565  
United States  
Ph: 518-672-7032  
Fax: 518-672-0083  
clerk@philmont.org

**Submit to contact:** Philmont, Village of  
Administration  
Jessica Thomas  
Clerk/Treasurer  
124 Main Street  
P.O. Box 822  
Philmont, NY 12565  
United States  
Ph: 518-672-7032  
Fax: 518-672-0083  
clerk@philmont.org

## Supporting document shown below:

The following supporting documents are available for download:

Document title	Description	Type
Architectural Design Services BOA Pre-development Activities		pdf

To download these documents, please visit the New York State Contract Reporter website: <http://www.nyscr.ny.gov>

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Opportunities posted in the last 7 days **192**

Total available opportunities **853**



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<b>Agency:</b>	Philmont, Village of
<b>Division:</b>	
<b>Administration</b>	
<b>Contract Number:</b>	Contract # C1001687
<b>CR Number:</b>	2101754
<b>Date of Issue:</b>	09/11/2023
<b>Due Date/Time:</b>	10/02/2023 2:00 PM
<b>County(ies):</b>	Columbia
<b>Location:</b>	Village of Philmont
<b>Classification(s):</b>	Architectural, Engineering & Surveying - Consulting & Other Services
<b>Opportunity Type:</b>	General

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## RFQ - Village of Philmont outreach to MWBE - Architectural Design Services (including Landscape Architectural services)

Sally Baker

Tue 9/19/2023 9:19 AM

To:Sally Baker <info@PBINC.ORG>

Cc:Jessica (new email) Clerk Thomas <clerk@philmont.org>

Bcc:sjainchill@aspect120.com <sjainchill@aspect120.com>;bthayer@bthayerassociates.com  
<bthayer@bthayerassociates.com>;info@behanplanning.com  
<info@behanplanning.com>;poyola@clasite.com <poyola@clasite.com>;cecehaydock@gmail.com  
<cecehaydock@gmail.com>;lszesnat@constantineenterprises.com  
<lszesnat@constantineenterprises.com>;julie@constructedground.com  
<julie@constructedground.com>;msm@cragnolindesign.com  
<msm@cragnolindesign.com>;mmwallinger@landartstudiony.com  
<mmwallinger@landartstudiony.com>;jmarquard@larchny.com  
<jmarquard@larchny.com>;mhellwig1@nycap.rr.com  
<mhellwig1@nycap.rr.com>;info@margieruddick.com <info@margieruddick.com>;lmunz@munz-  
associates.com <lmunz@munz-associates.com>;pclhvt99@gmail.com  
<pclhvt99@gmail.com>;bzs@restainodesign.com <bzs@restainodesign.com>;lizhandfry@studiohip.nyc  
<lizhandfry@studiohip.nyc>;gio@weintraubdiaz.com <gio@weintraubdiaz.com>;blythe@yostdesign.com  
<blythe@yostdesign.com>;sjainchill@aspect120.com <sjainchill@aspect120.com>;elise@aufgang.com  
<elise@aufgang.com>;liza@base-one.com <liza@base-one.com>;poyola@clasite.com  
<poyola@clasite.com>;lisa@dninteriors.com  
<lisa@dninteriors.com>;janus@janusweltondesignworks.com  
<janus@janusweltondesignworks.com>;dariam@envisionarchitects.com  
<dariam@envisionarchitects.com>;kd@kdousharm.com  
<kd@kdousharm.com>;mmwallinger@landartstudiony.com  
<mmwallinger@landartstudiony.com>;mail@landowarchitects.com  
<mail@landowarchitects.com>;jmarquard@larchny.com <jmarquard@larchny.com>;lmunz@munz-  
associates.com <lmunz@munz-associates.com>;karim@reformarchitecture.com  
<karim@reformarchitecture.com>;bzs@restainodesign.com  
<bzs@restainodesign.com>;greenshareendesign@gmail.com  
<greenshareendesign@gmail.com>;asloan@sloanarch.com <asloan@sloanarch.com>;Sally Baker  
<info@PBINC.ORG>;SALLY BAKER <sallybakerprojects@gmail.com>

Good morning,

You are receiving this email because your firm is listed as a certified MBE or WBE for Architectural & Planning services, and/or for Landscape Architectural services.

The RFQ was released by the Village of Philmont, NY. on the State Contract Reporter on 9/11/23.

The RFQ can be accessed on the home page of the [Village of Philmont website](#).

Questions Answers can be accessed on the Village of Philmont website at [RFQ page](#).

Many thanks,  
Sally

23rd  
Year!

**PBInc.org**

Housing Programs  
Food Program

Small Business  
Philmont Rising

Community-Based Revitalization

**MAILING ADDRESS**

Sally Baker

Exec. Director

Philmont Beautification, Inc.

PO Box 1072

Philmont, NY 12565

t. (518) 697 0038

**Project Addresses**

The Kitchen at Philmont - 116 Main St





# REQUEST FOR QUALIFICATIONS

## Architectural Design Services

Project: Philmont Rising - BOA Pre-development Activities

VILLAGE OF PHILMONT, NY

**Issued: September 8, 2023**

**RFQ Submission Deadline: September 29, 2023 by 2:00PM EST**

**IMPORTANT NOTICE:** A restricted period is currently in effect for this Procurement, and it will remain in effect until approval of the Contract. Proposers are prohibited from contact related to this procurement with any Village of Philmont or Philmont Beautification, Inc (PBI) employee other than the designated contacts listed below refer to:

**Designated Contacts for this Procurement:**

- For Project General Information.....Jessica Thomas, Clerk, Village of Philmont
- For Project Specific Clarifications.....Sally Baker, PBI, Project Management
- For Public Procurement Process Clarifications ..... Rob Fitzsimmons, Esq., Village of Philmont

This RFQ is posted on the Village of Philmont website  
<https://philmont.org/>

**For proposal submittal, kindly adhere to the proposal submission instructions within the RFQ and upload to the following Dropbox link:**

<https://www.dropbox.com/request/DXUz5jPIOxh9PeK8cV15>

## PROJECT DESCRIPTION

### Overview

The Village of Philmont has received a state award by the NYS Department of State (Contract C1001687 for a total project cost of \$209,072 to advance the Summit Lake and Its Watercourse Brownfield Opportunity Area Designated BOA through several pre-development activities. These include two architectural next level concept design projects for two sites owned by the Village of Philmont including: **a)** a community center with a waterfront park playground, **b)** a downtown parking area. These two projects are set within the broader context of other BOA pre-development activities that include studies, Summit Lake water quality testing, and zoning updates consistent with the objectives for desired redevelopment of selected sites within the context of Summit Lake, a 24 acre, publicly owned body of water, a critical public amenity, and as such a center catalyst of the SLWBOA as a natural resource.

Contingent upon this award, the Village of Philmont is soliciting offerors of a statement of qualifications in response to this Request for Qualifications for *only* the architectural services to assist the Village of Philmont with next level concept designs for two Work Plan tasks for the following:

- a) Design Concepts for Waterfront park, playground, and community center on the bank of Summit Lake (Subarea 1)** The selected consultant will develop draft and final design concepts for this subarea, as well as estimated construction costs.
  
- b) Design Concepts for Canal St. Parking Lots and Community Plaza (Subarea 2)** The selected consultant will develop draft and final design concepts for this subarea, as well as estimated construction costs.

Payment terms and fee amounts will be negotiated with the selected offeror. The fee for architectural services will be paid with DOS funds and local match.

### Context and Background

Philmont Rising Pre-development projects are an out-crop of a partnership project between the Village of Philmont and Philmont Beautification, Inc., that produced the [Summit Lake and Its Watercourse Brownfield Opportunity Area \(Designated BOA\)](#). The BOA area is 247 acres in the village designated by NY state in May 2019 as a primary area of interest for revitalization.

Extensive community outreach has taken place for the next level design concepts for Waterfront park, playground, and community center on the bank of Summit Lake (Subarea 1), including re-use requirements, a topological map, community visioning and input led by the Subarea 1 Working Group, village officials, and Philmont Beautification, Inc. A community presentation used for this outreach is available at: [Summit Lake and Community Center presentation](#).

Additional site-specific concept maps are available at: [Waterfront Framework, Community Center, and Canal St. maps](#).

### Work Plan

The selected consultant will develop detailed development plans for two strategic BOA sites Subareas 1 and Subarea 2 within the Summit Lake Watercourse BOA. These development plans will include various activities based on specific revitalization goals for each strategic subarea. These activities include design development, schematic designs, and cost estimates, to assess viability. This is the next step in advancing redevelopment of these underutilized, brownfields sites

into catalytic properties for revitalization.

## **Deliverables**

### **1. Design Concepts for Waterfront park, playground, and community center on the bank of Summit Lake (Subarea 1)**

#### ***Final Products:***

- Plans and specifications advancing an existing concept plan for the area including final design concepts, elevation drawings, section drawings, perspective drawings to convey how this strategic site, streetscape, and other areas of interest have the potential to appear after development or improvements are completed.
- An order-of-magnitude estimate of probable construction cost for the selected final Preliminary Design plan.

### **2. Design Concepts and Market Study for Canal St. Parking Lots and Community Plaza (Subarea 2)**

#### ***Final Products:***

- Plans and specifications advancing an existing concept plan for the area including final design concepts, elevation drawings, section drawings, perspective drawings to convey how this strategic site, streetscape, and other areas of interest have the potential to appear after development or improvements are completed.
- An order-of-magnitude estimate of probable construction cost for the selected final Preliminary Design plan.

## **Timeframe**

The project start date is anticipated for January 1, 2024 with a finish date of January 1, 2025.

Proposals should include a consultant timeframe to include:

- Up to 3 in-person meetings: Concept visioning, initial design concepts, final deliverables.
- A schedule of up to 6 Zoom meetings attended by BOA Committee, Subarea 1 and Subarea 2 community members and open to the general public to attend.
- One public open house event to discuss preliminary designs before the final draft of deliverables.

## **RFQ SUBMISSION REQUIREMENTS**

All responses to the RFQ shall include the following information:

1. **Cover Letter** - A letter of interest for the project.
2. **Statement of Qualifications and Staffing** – Provide a qualifications profile of the lead consultant and sub-consultants, including indication of the lead consultant, the proposed role of each consultant on the team. Also provide detailed information on each consultant, including the name of the firm, year established, and contact information.
3. **Summaries of relevant projects** – Describe relevant experience on similar projects for each firm and list the work experience of the individuals expected to be involved in the project. Include a minimum of three (3) professional references for whom a similar project has been completed within the last ten (10) years.
4. **Page Limit** - The proposal, encompassing items 1-3 above, shall not exceed 15 double-sided pages (30 total pages) including cover letter, project lists and contacts.  
All information submitted becomes property of the Village of Philmont upon submission.

The municipality Village of Philmont reserves the right to issue supplemental information or guidelines relating to the RFQ as well as make modifications to the RFQ or withdraw the RFQ.

Respondents should submit one (1) digital copy (PDF) and (2) printed copies of the RFQ submission by September 29, 2023 to:

**Municipality Contact Information**

**Mailing / Overnight Delivery of RFQ Submissions (2 copies) to:**

Village of Philmont  
Jessica Thomas, Village Clerk  
124 Main St. PO Box 822  
Philmont, NY 12565  
Email: [clerk@philmont.org](mailto:clerk@philmont.org)  
Tel: 518 672 7032

**Upload RFQ Submission in PDF format to the following Dropbox link:**

<https://www.dropbox.com/request/DXUz5jPIOxh9PeK8cV15>

Please expect a confirmation email upon receipt of the qualifications by the Village of Philmont.

If you have any questions about this project or the RFQ, please address them in writing either via U.S. mail or email to the local project manager, Philmont Beautification, Inc. to:

**Local Project Manager Contact Information**

**Submission of RFQ Questions to:**

Philmont Beautification, Inc  
Sally Baker, Project Manager  
Email: [info@pbinc.org](mailto:info@pbinc.org)

**Selection Process**

Qualifications will be reviewed by a selection committee comprised of representatives from the Village of Philmont BOA Committee, Subarea 1 Working Group members, and Philmont Beautification, Inc. Project Manager. A short-list of consultants will be selected to submit detailed proposals for the project with a project approach, scope of services, schedule and budget with details on staffing, hourly costs and overhead. Proposals selected will be presented in-person by the consultants at interviews.

**RFQ Schedule Summary:**

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<b>Consultants selected for short-list</b>	<b>October 11, 2023</b>
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This solicitation is being offered in accordance with federal and state statutes governing procurement of professional services. Accordingly, the Village of Philmont reserves the right to negotiate an agreement based on fair and reasonable compensation for the scope of work and services proposed, as well as the right to reject any and all responses deemed unqualified, unsatisfactory, or inappropriate.

# REQUEST FOR QUALIFICATIONS

## Architectural Design Services

**Project: Philmont Rising - BOA Pre-development Activities**

### VILLAGE OF PHILMONT, NY

The project will produce plans and specifications advancing existing concept plans for the area including final design concepts, elevation drawings, section drawings, perspective drawings to convey how strategic sites, streetscape, and other areas of interest have the potential to appear after development or improvements are completed, as well as estimated construction costs.

## SUPPLEMENTAL MAPS

### **1. Design Concepts for Waterfront park, playground, and community center on the bank of Summit Lake (Subarea 1)**

***Final Products:***

- Plans and specifications advancing an existing concept plan for the area including final design concepts, elevation drawings, section drawings, perspective drawings to convey how this strategic site, streetscape, and other areas of interest have the potential to appear after development or improvements are completed.
- An order-of-magnitude estimate of probable construction cost for the selected final Preliminary Design plan.

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ADVENTURE PLAY AREA TO UTILIZE EXISTING SLOPE



ENHANCEMENTS TO EXISTING PARKING AREA



OVERLOOK WITH VIEWS OF SUMMIT RESERVOIR



WALKING TRAIL WITH EDUCATIONAL KIOSKS

WALKING TRAIL CONNECTION TO ELM STREET

TO MAIN STREET

TO CANAL STREET

TO SUMMIT MILL

STREETScape IMPROVEMENTS

Elm Street

Summit Street

Elsworth Street

Alk Street

Lake Drive

EXISTING BEACH TO BE EXPANDED

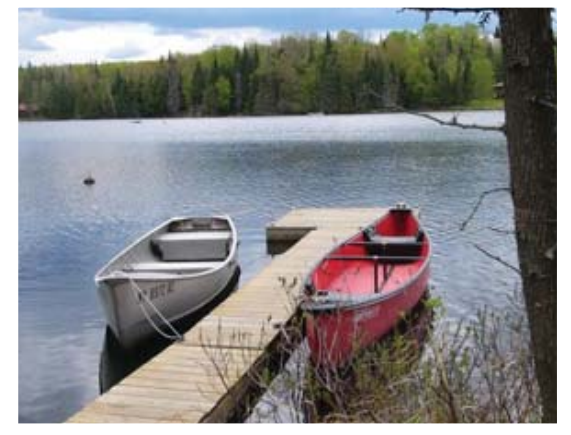


SHADED PICNIC AREA

COMMUNITY CENTER BUILDING EXPANSION FOR 800 SF

EXISTING COMMUNITY CENTER BUILDING

LAKE DRIVE PROPOSED TO BE CLOSED IN FRONT OF COMMUNITY CENTER



CANOE AND KAYAK LAUNCH

SUMMIT RESERVOIR

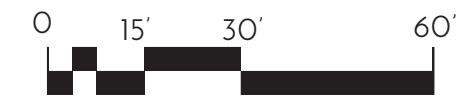
SUMMIT LAKE AND ITS WATERCOURSE VILLAGE OF PHILMONT

# LAKESHORE PARK AND COMMUNITY CENTER SITE ENHANCEMENT CONCEPT PLAN

DATE: NOVEMBER 18, 2015



SCALE:





# Village Community Center



Lake Shore Drive



# SUPPLEMENTAL MAPS

## 2. Design Concepts for Canal St. Parking Lots and Community Plaza (Subarea 2)

### *Final Products:*

- Plans and specifications advancing an existing concept plan for the area including final design concepts, elevation drawings, section drawings, perspective drawings to convey how this strategic site, streetscape, and other areas of interest have the potential to appear after development or improvements are completed.
- An order-of-magnitude estimate of probable construction cost for the selected final Preliminary Design plan.

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Main Street

Main Street

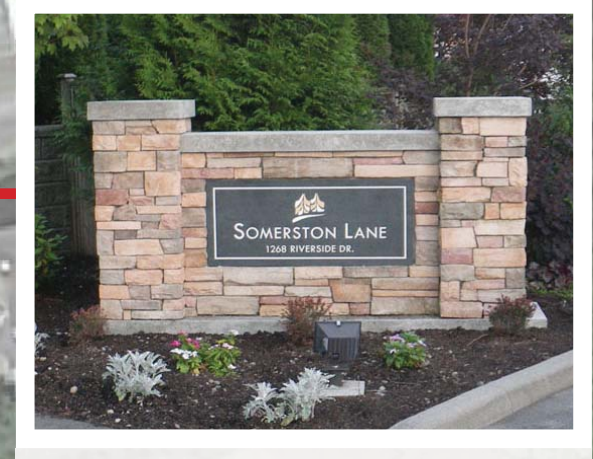
Elm Street

Elm Street

Canal Street



**PROPOSED BUILDING FOR FUTURE DEVELOPMENT**  
POTENTIAL BUILDING USES:  
• FINE CRAFTSMAN  
• LIGHT INDUSTRIAL  
• ALTERNATIVE HEALTH CARE  
• CLASS A OFFICE SPACE



**INTERPRETIVE MONUMENT SIGNAGE**



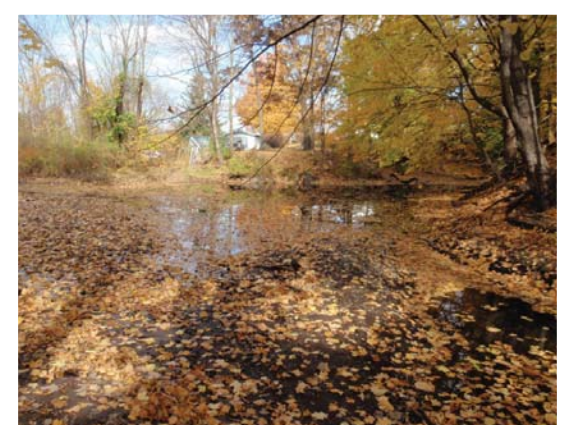
**MILL REMAINS TO BE UNCOVERED**



**INTERPRETIVE SIGNAGE**



**MILL POND PERIMETER BOARDWALK OVERLOOK**



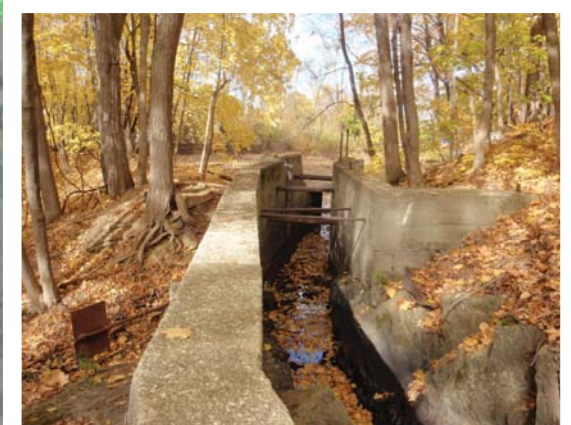
**EXISTING MILL POND**

**EXISTING BUILDINGS**

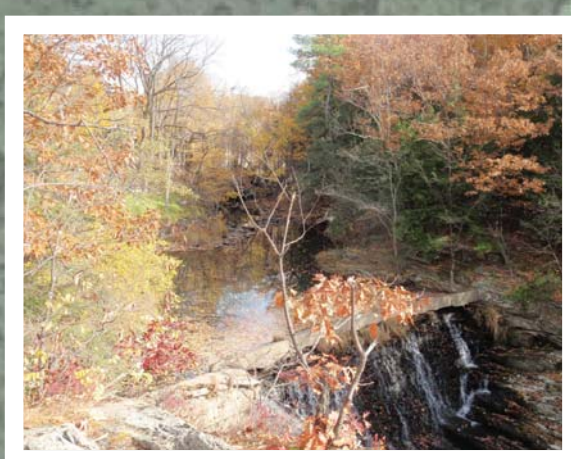
**ENTRY PLAZA WITH WATER FEATURE**

**EXISTING BUILDING WITH PROPOSED EXPANSION FOR 2,000 SF**

**WALKING TRAIL THROUGH WOODED AREA**



**WALKING TRAIL ALONG REMAINING MILL SLUICE**



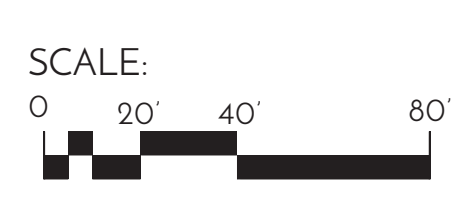
**OVERLOOK TO DAM AND SUMMIT MILL WITH INTERPRETIVE SIGNAGE**

**HIGH FALLS**

SUMMIT LAKE AND ITS WATERCOURSE  
VILLAGE OF PHILMONT

# CANAL STREET MILL SITE ENHANCEMENT CONCEPT PLAN

DATE: NOVEMBER 18, 2015







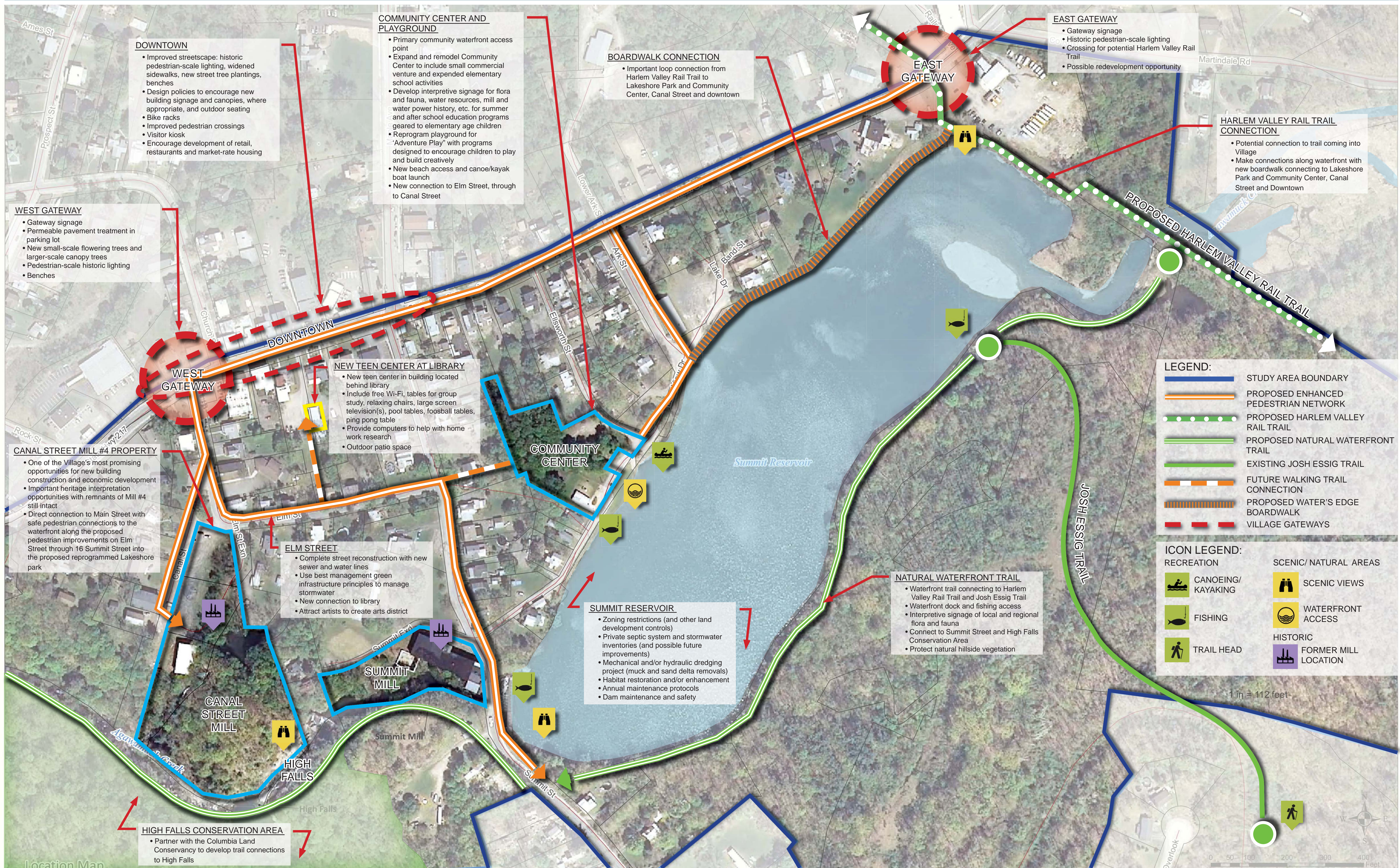
Canal St area

# SUPPLEMENTAL MAPS

BOA Framework plan

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RFQ - Architectural Design Services  
Project: Philmont Rising - BOA Pre-development Activities  
in the Village of Philmont, NY

**Questions & Answers – Set # 1, 09/15/23**

1. Can you clarify the deliverables for the project? The RFQ mentions “next level concept designs”, schematic design” and “plans and specifications”. These all represent very different phases of design.

For the purposes of the BOA pre-development activities, next level concept designs include the following:

**Deliverables**

**1. Design Concepts for Waterfront park, playground, and community center on the bank of Summit Lake (Subarea 1)**

***Final Products:***

- Plans and specifications advancing an existing concept plan for the area including final design concepts, elevation drawings, section drawings, perspective drawings to convey how this strategic site, streetscape, and other areas of interest have the potential to appear after development or improvements are completed.
- An order-of-magnitude estimate of probable construction cost for the selected final Preliminary Design plan.

**2. Design Concepts for Canal St. Parking Lots and Community Plaza (Subarea 2)**

***Final Products:***

- Plans and specifications advancing an existing concept plan for the area including final design concepts, elevation drawings, section drawings, perspective drawings to convey how this strategic site, streetscape, and other areas of interest have the potential to appear after development or improvements are completed.
- An order-of-magnitude estimate of probable construction cost for the selected final Preliminary Design plan.

2. Will one consultant be selected for both subareas or may they be divided between two consultants?

Qualifications can be submitted for one site by one consultant, or two consultants with each consultant addressing either Subarea 1 or Subarea 2, or two consultants as a team for both Subareas. The Village reserves the right to select two consultants (one for each Subarea).

3. Can you clarify/be more specific what is expected from the market study? Is the market study about the potential parking revenue?

The RFQ is only addressing architectural design services for Subarea 1 and Subarea 2. As such, qualifications do not need to address the Subarea 2 scope of work for a market study for the Canal St parking lots and Community Plaza. A correction was posted to the RFQ on 9/12/23 available on the [Village of Philmont website](#).

4. Is a budget set for this phase of work?

The RFQ is intended to receive qualifications from consultants. Based on the selection of consultants who submit the required RFQ materials each consultant will be contacted for a follow-up conference where a budget (bid) will be discussed and negotiated.

5. For Task A, is sub area 1 the area shown in blue on PDF page 2/57 of the Summit Lake and Community presentation or should only the subarea shown on page 8/57 be considered the limits of work?

The PDF referenced in the above Question #5 is:

**Summit Lake and Community Center Presentation**

**Page 1** shows the waterfront of Subarea 1 with the Community Center location.

**Page 2** shows all five BOA Subareas and the interconnection of Subareas.

**Page 8** shows the concept map completed in 2018 for the community center, playground, waterfront, and Lakeshore Drive in relation to Summit Lake.

Subarea 1 and Subarea 2 materials can be found at:

<https://philmont.org/rfq-architectural-design-services/>

**Waterfront Framework, Community Center, and Canal Street Maps**

This document contains site-specific maps for Subarea 1 and Subarea 2.

**Summit Lake and Community Center Presentation**

This document is one of several community presentations for Subarea 1 conducted by the Subarea 1 Working Group and Philmont Beautification, Inc in 2022 based on community visioning sessions conducted in 2021 to advance the concepts for the redevelopment of the Community Center, Playground, and the waterfront of Summit Lake.

6. Is it desirable for responses to include landscape, engineering, and cost estimation sub-consultants for the two Work Plan tasks included in this RFQ? Or, as stated on page 2 of the RFQ, *only* architectural services exclusive of outside consultants?

Submitting qualifications for landscape architectural services, engineering, and architectural services is acceptable as applicable to the two different Subareas. Qualifications can include two separate consultants, one consultant for each of the two Subareas, or two consultants as a team.

The RFQ submission does not require a cost estimation at this time. Selected consultants will receive a follow-up where budget and bid amounts will be discussed and negotiated.

7. Could you please confirm the official deadline(s) (date and time) for digital and hardcopy submissions?

Submission of RFQ Responses is due September 29, 2023 by 2.0PM EST

8. Your RFQ requests qualifications from firms for only the architectural services to assist the Village of Philmont with next level concept designs for two Work Plan tasks for Subarea 1 and Subarea 2. Do you want designs from a Landscape Architect for the Waterfront park, playground, parking lots and plaza as well as Architectural designs for the community center? Or all designs from an architect?

Qualifications can be submitted by two different consultants, one for Architectural next level concept designs, and one for Landscape Architectural next level concept designs.

**Subarea 1** includes next level concept designs for the existing community center building, and the playground, and the site's spatial relation to the waterfront and Lakeshore Drive.

**Subarea 2** includes the three parking lots and land area directly in front of the village owned warehouse, but does not require architectural design services for the warehouse, or any other building within the site.

9. In regards to the project/RFQ referenced above, are there any additional documents available? Perhaps the prior design work?

On page 2 of the RFQ there are two links provided to additional materials documents:

*Summit Lake and Community Center*, is a PPT presentation documenting visioning sessions held in the community for the redevelopment of the community center and playground and the site spatial relation to Summit Lake and the waterfront.

*Waterfront Framework, Community Center, and Canal St. maps* show the concept maps completed in 2018 for Subarea 1 and Subarea 2.

**Questions Answers Set # 1, 09/15/23**

Philmont Beautification, Inc.  
Project Management

*This document was prepared with funding provided by the New York State Department of State under Title 11 of the Environmental Protection Fund.*

VILLAGE OF  
**PHILMONT**  
NEW YORK



Department  
of State

**PBInc.org**  
Community-Based Revitalization



## **BOA CO-CHAIR MEETING**

DATE: 26 September, 2023 – 7pm – Village Office in-person meeting

Mayor Brian Johnson – Village Co-Chair

Bob Macfarlane – Village Co-Chair

Sally Baker – PBI – Project Management

Barbara Sagal – LWRP Chair of Advisory Committee (WAC)

Subarea 1 Working Group community participation: Mark Rowntree, David Bolevice,  
Karen Schoemer

### **AGENDA**

#### **1. Review BOA RFQ**

- a) Scoring chart for RFQ (attachment)
- b) Review RFQ selection timeline (attachment)
- c) Schedule 2 meetings – one in person, one in Zoom both in October, or both in-person with Mayor Johnson?

#### **2. DRI / NYFORWRD grant – 2024**

- a) Invite Debra Gitterman to the October BOA meeting to discuss BOA and LWRP projects for inclusion in the Village's NYForward grant proposal spearheaded by Debra to develop the proposed submission for September 2024.

#### **3. Update on LWRP**

- a) LaBella re-scheduled the September 13 meeting to October.
- b) LaBella finishing up Task 9 to be presented to the general public in an open house meeting. More than likely, that presentation will take place online or in-person by LaBella at a location in the towns participating.
- c) Payment Request #2 was submitted. Now working on Payment Request #3.

#### **4. Update on Historic District**

- a) SHPO letters to go out 1<sup>st</sup> week in October to property owners in Historic District.
- b) Heritage Working Group to stage a pop-up tent outside Post Office on November 4<sup>th</sup> and November 11<sup>th</sup> to inform Philmonters of public hearing.
- c) Public Hearing – scheduled for Village Hall – Tuesday Nov 14 at 7pm

Adjourn

## **Deliverables**

### **1. Design Concepts for Waterfront park, playground, and community center on the bank of Summit Lake (Subarea 1)**

#### ***Final Products:***

- Plans and specifications advancing an existing concept plan for the area including final design concepts, elevation drawings, section drawings, perspective drawings to convey how this strategic site, streetscape, and other areas of interest have the potential to appear after development or improvements are completed.
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### **2. Design Concepts and Market Study for Canal St. Parking Lots and Community Plaza (Subarea 2)**

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## **Timeframe**

The project start date is anticipated for January 1, 2024 with a finish date of January 1, 2025.

Proposals should include a consultant timeframe to include:

- Up to 3 in-person meetings: Concept visioning, initial design concepts, final deliverables.
- A schedule of up to 6 Zoom meetings attended by BOA Committee, Subarea 1 and Subarea 2 community members and open to the general public to attend.
- One public open house event to discuss preliminary designs before the final draft of deliverables.

## **RFQ SUBMISSION REQUIREMENTS**

All responses to the RFQ shall include the following information:

1. **Cover Letter** - A letter of interest for the project.

2. **Statement of Qualifications and Staffing** – Provide a qualifications profile of the lead consultant and sub-consultants, including indication of the lead consultant, the proposed role of each consultant on the team. Also provide detailed information on each consultant, including the name of the firm, year established, and contact information.
  3. **Summaries of relevant projects** – Describe relevant experience on similar projects for each firm and list the work experience of the individuals expected to be involved in the project. Include a minimum of three (3) professional references for whom a similar project has been completed within the last ten (10) years.
  4. **Page Limit** - The proposal, encompassing items 1-3 above, shall not exceed 15 double-sided pages (30 total pages) including cover letter, project lists and contacts.  
All information submitted becomes property of the Village of Philmont upon submission.
- 

### **Evaluation of Qualifications**

Respondents will be evaluated according to the following factors:

- a) Consultant Qualifications (experience with similar projects, ability to work with municipalities to attain desired outcomes, and knowledge of the topic) - 85%
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**BOA Predevelopment Consultant Proposals  
SCORING CHART  
RFQ for Subarea 1 (Community Center) and Subarea 2 (Canal St)**

**Review Criteria for Proposals: (maximum 100 points, plus an additional 20 bonus points)**

<b>Scoring Criteria</b>	<b>Maximum Points</b>	<b>YOUR SCORE</b>	<b>YOUR COMMENTS JUSTIFYING YOUR SCORE</b>
1. Cover Letter – quality of firm’s introduction letter	<i>20 points</i>		
2. Qualifications and Staffing – leads, sub-consultants, team	<i>20 points</i>		
3. Staff or team – degree of appropriate design experience	<i>20 points</i>		
4. References for prior BOA pre-development activities (or similar) projects like DRI, NYF, LWRP, or public spaces and community-use buildings	<i>20 points</i>		
5. Proposed Timeline	<i>20 points</i>		
6. Bonus points – prior or current projects that stand out as being similar in scale to Philmont’s BOA.	<i>10 points</i>		
7. Bonus points – familiarity with Philmont’s revitalization	<i>10 points</i>		
<b>TOTALS</b>	<i>120 points</i>		

**NAME OF FIRM / COMPANY:** \_\_\_\_\_

**YOUR NAME** \_\_\_\_\_

Julie Veronezi  
Philmont Community Center

Vision for Philmont's CC

A focal point for building a strong and positive community; intergenerational, shared inspirations, meeting the needs of the community and its residents, communicating positive values, drawing from and developing resources from within and outside the community

Demographics – study

BOA Area 1 Lake, Park, Community Center

### **Accessibility**

- Accessible to the widest spectrum of users
- drop off and unloading areas
- Parking adjacent to building
- walkway with railings
- handicapped accessible
- transportation or walk way to and from Main St. area

### **Safety**

- lighting in parking area, walkways and entrances
- water safety considerations
- Lake Drive - car and safety vehicle accessibility
- Transportation to and from the center from Main St .

### **Signage**

- center
- road entrances and center of village
- Kiosk

### **Use**

- storage areas for multiple users
- green house
- gallery area for presentations with audio and visual components
- computer work and research area
- cooking facility
- exercise open area
- classroom Classes include general education for children and adults, art, music, cooking, physical education.
- Storage for boats, life jackets, and swim changing area

**Aesthetics** - Use natural light from the east and south, water dynamics, rock cliff elevation is very appealing

The municipality Village of Philmont reserves the right to issue supplemental information or guidelines relating to the RFQ as well as make modifications to the RFQ or withdraw the RFQ.

Respondents should submit one (1) digital copy (PDF) and (2) printed copies of the RFQ submission by September 29, 2023 to:

**Municipality Contact Information**

**Mailing / Overnight Delivery of RFQ Submissions (2 copies) to:**

Village of Philmont  
Jessica Thomas, Village Clerk  
124 Main St. PO Box 822  
Philmont, NY 12565  
Email: [clerk@philmont.org](mailto:clerk@philmont.org)  
Tel: 518 672 7032

**Upload RFQ Submission in PDF format to the following Dropbox link:**

<https://www.dropbox.com/request/DXUz5jPIOxh9PeK8cV15>

Please expect a confirmation email upon receipt of the qualifications by the Village of Philmont.

If you have any questions about this project or the RFQ, please address them in writing either via U.S. mail or email to the local project manager, Philmont Beautification, Inc. to:

**Local Project Manager Contact Information**

**Submission of RFQ Questions to:**

Philmont Beautification, Inc  
Sally Baker, Project Manager  
Email: [info@pbinc.org](mailto:info@pbinc.org)

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## RFQ responses received

Sally Baker <info@PBINC.ORG>

Fri 9/29/2023 2:02 PM

To: Barbara Sagal, Chair WAC <Babwertz@aol.com>; Deputy Mayor Douglas C Cropper <cropalt@verizon.net>; Julia Veronezi <izenorev@taconic.net>; Mark Rowntree <markrobertrowntree@gmail.com>; David & Sheri Bolevice <bolevised@yahoo.com>; Karen Schoemer <kschoe@aol.com>; Julia Sedlock <sedlockjulia@gmail.com>; Bob Macfarlane <fenwaygreenmonstah@yahoo.com>  
Cc: Jessica (new email) Clerk Thomas <clerk@philmont.org>

📎 2 attachments (438 KB)

RFQ SCORING CHART - BOA Predevelopment consultant selection - fillable pdf.pdf; RFQ - Architectural Design Services BOA Pre-development Activities 9-5-23 - revised urls.pdf;

Hello BOA Committee members, and Subarea leads, (Jessica, please print for the Mayor's folder).

Success! We received a total of 12 responses to the RFQ by 2pm today. Each firm received an email from PBI confirming receipt and copied to Jessica.

You can download the 12 responses from [the Dropbox](#).



Village of Philmont RFQ proposals

Shared with Dropbox

[www.dropbox.com](http://www.dropbox.com)

### The list of companies that responded are as follows:

AJA Architecture and Planning

LaBella Associates

Rice+Lipka Architects and Starr Whitehouse Landscape Architects and Planners

LVF Landscape Architects, PLLC

Jordan Parnass Digital Architecture LLC

Spacesmith

Garnett DePasquale Projects

ALAO and SYLA

Saratoga Associates

All Hands Architecture

DEMO (Architect) and OSD (Landscape Architect)

UE Architecture



**One set of paper copies of the responses will be available in the Village Office on the conference table by Monday if you prefer doing your scoring with a printed copy. The Mayor gets the other set.**

I've attached the Scoring Chart, and the RQF so you can refresh on the criteria for scoring.

Any questions, please use "reply all", otherwise see you on Wednesday November 11<sup>th</sup> at 7pm for our 1<sup>st</sup> selection meeting.

Also - if you need to look again at the additional materials we provided on the village website - [RFQ landing page](#).

These would be good to look at as the Community Center presentation slides by Subarea 1 (Mark as lead) were provided, plus the BOA maps and BOA Framework which you should be familiar with when you are scoring the RFQ responses.

Many thanks,  
Sally

23rd  
Year!

**PBInc.org**

Housing Programs  
Food Program

Small Business  
Philmont Rising

Community-Based Revitalization

**MAILING ADDRESS**

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**Project Addresses**

The Kitchen at Philmont - 116 Main St

## Top 3 choices of RFQ responses.

Sally Baker <info@PBINC.ORG>

Wed 10/25/2023 10:04 AM

To: Bob <fenwaygreenmonstah@yahoo.com>; Barbara Sagal, Chair WAC <Babwertz@aol.com>; Mark Rowntree <markrobertrowntree@gmail.com>; Karen Schoemer <kschoe@aol.com>; David & Sheri Bolevice <bolevised@yahoo.com>  
Cc: Jessica (new email) Clerk Thomas <clerk@philmont.org>

Hello Bob, Barbara, Karen, and Mark, (Jessica - please print for the Mayor's folder).

Please note Mayor Johnson's top 3 choices were included in the evaluation scoring below.

Please note as discussed last night, Matthew Smith at DOS suggested we wait until the selection process is complete until we release any information for the final choice of the firm to go to contract.

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Thank you to all that attended last night's BOA Committee to discuss the final top 3 choices of firms who submitted responses to the BOA RFQ.

The roundtable format of the meeting provided each member to discuss their top 3 choices (5 mins each) including their notes and scores in the scoring charts. The choices were written down and then the Committee discussed the selection to arrive at the Committee's final choices as:

- 1<sup>st</sup> choice - Rice & Lipka Architects, selected by 5 of the 6 members,
- 2<sup>nd</sup> choice - LVF Landscape Architects, selected by 4 of the 6 members,
- 3<sup>rd</sup> choice - ALAO and SYLA, selected by 4 of the 6 members.

Over the next few days, I will assemble the Summary Notes to document the entire selection process over the three meetings held on Oct 11, 18, and 24 and get the Summary Notes to you to approve in our next meeting.

In the meantime, I will be in contact with the firms selected to set up a telephone consultation or Zoom meeting with each firm to negotiate cost according to the BOA grant allocated budget for design services.

Many thanks again for everyone's hard work for this selection and for completing the scoring charts. We worked in good spirit and a harmonious effort.

A good job by all!  
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