



# **REQUEST FOR PROPOSAL: COMPREHENSIVE PLAN UPDATE**

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Town of Shelter Island, New York

February 3, 2023

**BFJ Planning**



# TOWN OF SHELTER ISLAND

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## COMPREHENSIVE PLAN UPDATE

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Associate Principal

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# **LETTER OF TRANSMITTAL**

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February 3, 2023

Amber Wilson/Deputy Town Clerk  
Town of Shelter Island  
38 N. Ferry Road  
P.O. Box 970  
Shelter Island, NY 11964

Re: Proposal to Update Shelter Island's Comprehensive Plan

Dear Ms. Wilson and the Comprehensive Plan Task Force,

BFJ Planning (BFJ) is pleased to submit this proposal for the preparation of a Comprehensive Plan Update for the Town of Shelter Island. BFJ specializes in planning, urban design, and transportation and environmental planning. We have over 40 years of experience in preparing comprehensive/master plans, drafting zoning codes, creating design manuals, conducting environmental analysis, and engaging the public in the planning process.

We have a strong working knowledge of Suffolk County, having recently completed work in the Towns of Islip, Southampton, Brookhaven, and Huntington. We are currently working with Riverhead to complete their Comprehensive Plan. This effort is somewhat similar in that we are stepping in to complete a project already underway by the Town and its prior consultants. We were also the planning consultants for the 2009 Nassau County Master Plan for New Suburbia. We understand that Shelter Island is a unique community in many ways. Our proposal highlights comprehensive plans we have prepared for other rural communities in the region, such as North Castle and Pine Plains, NY. We strongly feel that this experience will help us to craft a plan that is easy to use, has longevity, and is supported by the local community.

Our team is committed to a principal-led project management approach, and through our broad experience, we have the ability to develop and maintain our project schedules and budgets. The BFJ team will be directed by Noah Levine, AICP, who has an extensive track record in comprehensive planning throughout the region. Mr. Levine's family permanently resides in Sag Harbor, and he has spent many summers living and working on the East End. Frank Fish and Jonathan Martin will be actively involved as a resource principals, and Emily Junker will be the project manager.

CHARLOTTE  
CHICAGO  
NEW YORK CITY  
PITTSBURGH  
STAMFORD

FRANK S. FISH FAICP  
GEORGES JACQUEMART PE, AICP  
SUSAN FAVATE, AICP  
SARAH YACKEL, AICP

BUCKHURST FISH  
& JACQUEMART, INC.  
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NEW YORK, NY 10003  
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[WWW.BFJPLANNING.COM](http://WWW.BFJPLANNING.COM)

We strongly believe we can produce a comprehensive plan that provides the Town of Shelter Island with clear, actionable policies and an implementation strategy that is both ambitious and achievable. Our approach is to engage the community in a robust and inclusive public outreach process to learn from local experts and build consensus on a plan that the community can enthusiastically support and that can be adopted by the Town Board. Our approach also shows innovative outreach tools we can use for outreach. We look forward to having an opportunity to discuss this project with you further.

We are pleased to be considered for this work. If you have any questions, please call me at 646.225.6221 or email me at [n.levine@bfjplanning.com](mailto:n.levine@bfjplanning.com).

Sincerely,

A handwritten signature in blue ink that reads "Noah Levine". The signature is written in a cursive, flowing style.

Noah Levine, AICP, PP  
Associate Principal

**FIRM**

**BACKGROUND**

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# FIRM PROFILE

## BFJ PLANNING FIRM PROFILE

BFJ Planning (BFJ) is a consulting firm with 15 full time employees, providing professional expertise in planning and related fields since its establishment in 1980. BFJ provides the following services for public, private, and non-profit clients throughout the country and overseas:

- Planning
- Urban design
- Environmental analysis
- Real estate consulting
- Transportation planning

This range of services enables BFJ to bring a project from the initial feasibility stage, through planning and approvals, to site design and implementation. Principals and staff provide expertise in many areas, which is highly beneficial for complex development projects that require informed, innovative thinking from different professional points of view. This inclusive approach ensures that BFJ's planning and design recommendations are realistic and achievable within project constraints.

BFJ's expertise includes developer negotiations, impact mitigation, and government programs. The firm also has extensive experience with consensus building and the public participation process, conducting public meetings, workshops, and other community liaison programs aimed at public participation and review. These programs allow the firm to provide innovative solutions that fulfill the needs of clients and communities. BFJ has successfully completed more than 1,000 projects in the U.S., East Asia, Europe, and South America.

The BFJ Team is composed of highly qualified consultants with proven experience completing Comprehensive Plans, Zoning Code Updates, State Environmental Quality Review (SEQR), and projects of similar scope and scale. Our firm has the requisite experience to conduct the full scope of work required for this opportunity.

The following is a summary of the key areas of expertise that our team would bring to the Town of Shelter Island Comprehensive Plan Update.

**Planning**—BFJ Planning brings more than 40 years of planning experience to this project, having prepared plans and planning studies at a range of scales, in municipalities throughout the region and around the world, including Long Island. We work closely with municipal staff and citizen advisory committees throughout the planning process, providing drafts for review prior to working meetings, taking comments and making revisions as necessary. This close working relationship allows us to be responsive to comments and make corrections promptly to ensure that the process continues to move forward at an appropriate pace.

**Zoning**—Our team has expertise in crafting zoning that implements municipal planning goals, such as sustainability, preservation of open space and community scale, and walkable communities.

**Generic Environmental Impact Statements**—BFJ has established itself as a leader in directing the environmental review process under the New York State Environmental Quality Review Act [6 NYCRR Part 617 (SEQRA)], for both public and private sector clients throughout New York State. BFJ is well versed in SEQRA standards,

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procedures and requirements, and has prepared SEQRA environmental assessments and impact statements for a wide range of projects. We have undertaken environmental work for municipalities, corporations, community groups, institutions, private developers, school districts, and other public agencies. Specifically, BFJ has extensive experience preparing Generic Environmental Impact Statements (GEIS) for Comprehensive Plans and zoning code updates, having completed numerous such studies in recent years.

**Community Outreach and Visioning**—The BFJ Team strongly believes that it is critical to encourage and seek public input in order to create a plan that is embraced by the community and reflective of local priorities. We are community-based planners at heart and are committed to bringing the public into the planning process. Input received from the community will shape the vision for Shelter Island for the next decade and longer. Our proposed outreach approach discussed in this proposal is informed by a diversity of strategies aimed at eliciting meaningful input from representative stakeholders about how the Town should change over time—and what should remain constant. The ultimate goal is not to achieve agreement on every topic discussed, but rather to gain overall consensus for the planning vision.

**Urban Design and Visualization of Redevelopment Options**—The BFJ Team uses graphic and visualization techniques to develop conceptual design ideas and communicate to members of the public. Our in-house urban designers understand the power of compelling and informative visuals in providing the audience with a clear understanding of the built and natural environment, both in terms of what exists and in looking at hypothetical build-out scenarios.

**Sustainability and Resilience**—The BFJ Team has worked on sustainability action plans for cities and towns throughout the Northeast. On each assignment, we identified general and specific action items that would allow each municipality to achieve a greater level of sustainability, to reduce carbon emissions, prioritize infrastructure improvements and increase awareness of and provide opportunity for residents to live healthier lives. From energy efficiency, transit and connectivity enhancements, infrastructure and open space, to public health and response to climate change, we have collaborated with professional colleagues, community leaders, and municipal staff in identifying needs and action items, priorities, and initiatives to achieve success and accomplish goals. Our team has also gained experience in addressing the challenges communities due to climate change, including six plans for the post Superstorm Sandy NY Rising Community Reconstruction Program.

Through extensive experience with significant comprehensive planning and waterfront planning, BFJ has developed a reputation for efficient project management, an ability to focus on key issues, a successful track record of community collaboration, and a proven track record of preparing implementable community-based plans.

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## **FIRM CAPACITY**

BFJ is comfortable with the firm's current workload and its ability to effectively and efficiently provide required services to Shelter Island. As a small firm of approximately 15 people, we are extremely nimble and able to respond quickly to evolving project needs, should they arise. However, we are large enough that individual staff members have the full support of the firm, and we have available senior staff included in this proposal who can step in as needed, depending on the availability of the project team and the specific skills and expertise required (for example, urban design, traffic, and parking). We commit to being available in-person, or remotely, for all necessary meetings related to Shelter Island's planning needs. BFJ maintains the capacity to dedicate staff to provide planning services to the Town during the duration of the contract period. It is anticipated that the number of hours required per week will vary significantly depending on project deadlines. BFJ maintains the capacity to dedicate staff full-time (up to 40 hours per week) to the Shelter Island project during busy time periods in order to support the Town during periods of heavy work demand.

# **PROJECT TEAM**

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## PROJECT TEAM

To bring the highest level of professional services to the Town of Shelter Island and the preparation of its Comprehensive Plan Update, BFJ Planning has assembled a multidisciplinary team with a strong reputation and depth of experience in land use planning, infrastructure, sustainability, urban design, mobility planning, and demographic and market analysis.

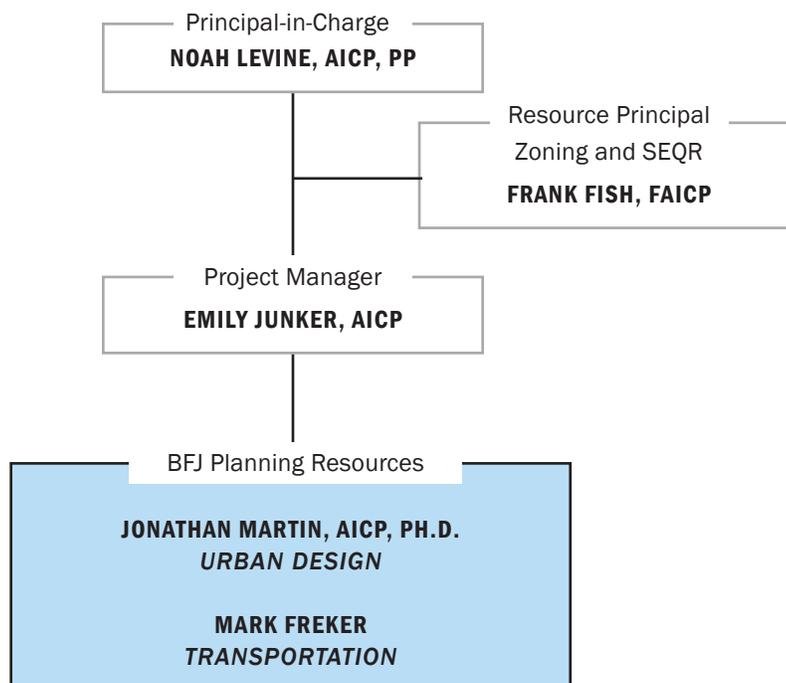
The organization chart below illustrates the breakdown of responsibilities for team members. BFJ will be responsible for overall project management and plan preparation. In addition, we will staff and run all meetings and oversee community engagement; if needed, we have the ability to bring on a local engineering firm to provide input on infrastructure and resilience issues.

For this project, the Principal-in-Charge would be Noah Levine, AICP, PP, who would be the day-to-day contact for the Town and attend all Committee and staff meetings, public workshops and stakeholder meetings, and would coordinate the work of all team members, including subconsultants. Mr. Levine has experience in managing comprehensive planning projects throughout the region. His family also resides in Sag Harbor. Frank Fish, FAICP will be involved as a resource principal, while Jonathan Martin and Mark Freker will be available as needed for issues of urban design or transportation, respectively.

The relevant experience of each team member are addressed in the following pages.

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## TOWN OF SHELTER ISLAND



# Noah Levine AICP, PP

## ASSOCIATE PRINCIPAL



Noah Levine is a project manager and design professional with a broad range of planning experience. He has worked with private and public sector clients on projects ranging from traffic, pedestrian and parking studies; land use and zoning plans; neighborhood and downtown revitalization; site design; municipal consulting; and master/comprehensive plans. He has also led BFJ visioning workshops, charrettes, and other outreach methods, including interviews and surveys. His most recent work in Long Island includes a neighborhood study for Bayport in Islip, a visioning study in the Town of Brookhaven, an integrated land use and transportation plan for the Melville Employment Center in Huntington and a New York Rising Community Reconstruction Plan in East Rockaway. Mr. Levine's family resides in Sag Harbor, NY.

### EDUCATION

Bachelor of Arts: Science and Society,  
Wesleyan University

Master of Urban Planning, New York  
University, Robert F. Wagner Graduate  
School of Public Service

### REGISTRATION

American Institute of Certified Planners  
NJ State Board of Professional Planners

### MEMBERSHIPS

New York Metro Chapter of the American  
Planning Association

### RELEVANT PROJECT EXPERIENCE

#### *Comprehensive/Neighborhood Plans*

**BAYPORT LAND USE AND ZONING STUDY**  
Islip, New York  
Role: Project Manager

**MAIN STREET PLANNING AND  
DESIGN GUIDELINES**  
Port Washington, New York  
Role: Project Manager

**ROUTE 25A CORRIDOR STUDY**  
Brookhaven, New York  
Role: Project Manager

**PARSIPPANY MASTER PLAN**  
Parsippany, New Jersey  
Role: Project Manager

**PLAN OF CONSERVATION AND DEVELOPMENT**  
Meriden, Connecticut  
Role: Project Manager

**JERSEY CITY MASTER PLAN AND LAND  
USE ELEMENT**  
Jersey City, New Jersey  
Role: Project Manager

**HOBOKEN MASTER PLAN REEXAMINATION AND  
LAND USE ELEMENT**  
Hoboken, New Jersey  
Role: Project Manager  
*Award: 2009 Smart Growth Award from New  
Jersey Future*

**DOWNTOWN REVITALIZATION INITIATIVE**  
Middletown, New York  
Role: Project Manager

**NEW YORK RISING COMMUNITY  
RECONSTRUCTION PLANS**  
Bay Park/East Rockaway and Gravesend/  
Bensonhurst, New York  
Role: Project Planner  
*Award: "Rising to the Top" award in recognition  
of public outreach efforts.*

**COMPREHENSIVE PLAN AND LWRP**  
Croton-on-Hudson, New York  
Role: Project Manager

**NEIGHBORHOOD PLANS**  
Cos Cob, Old Greenwich/Riverside/North  
Mianus, and Glenville/Pemberwick  
Greenwich, Connecticut  
Role: Project Planner

**RESERVOIR AVENUE NEIGHBORHOOD  
REVITALIZATION ZONE PLAN**  
Bridgeport, Connecticut  
Role: Project Planner

**MELVILLE EMPLOYMENT CENTER PLAN**  
Huntington, New York  
Role: Project Planner

#### *On-Call Advisory*

**PLANNING ADVISORY SERVICES**  
Tuckahoe, New York  
Role: Project Manager

#### *Land Use and Zoning Studies*

**TRANSIT-ORIENTED DEVELOPMENT  
ZONING STUDY**  
Mamaroneck, New York  
Role: Project Planner  
*Award: Pomeroy Award for Zoning Achievement,  
New York Planning Federation*

**TRANSIT ORIENTED DEVELOPMENT STUDY**  
Branford, Connecticut  
Role: Project Manager

**NEWBURGH FUTURE LAND USE PLAN**  
Newburgh, New York  
Role: Project Planner

**SOUTHAMPTON HOSPITAL ZONING ANALYSIS**  
Southampton, New York  
Role: Project Planner

# Frank S. Fish FAICP

PRINCIPAL



Frank Fish has over 40 years of experience in urban planning. He directs the firm's master planning, zoning, economic and development feasibility practice areas. He has worked on a range of planning projects from countywide master plans and statewide housing studies to large-scale development proposals for private sector clients.

## SELECT PROJECT EXPERIENCE

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### EDUCATION

Master of Science, Planning, Pratt Institute

Bachelor of Arts, Political Science, Boston College

Associate of Arts, Classics, St. Thomas Seminary

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### MEMBERSHIPS

Fellow, American Institute of Certified Planners

Board Member, New York Planning Federation

Past Commissioner, AICP Commission

Past President, New York Metropolitan Chapter APA

Past President, American Society of Consulting Planners

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### TEACHING

New York University, Robert Wagner School of Public Service, Adjunct Professor of Planning

Pratt Institute, Graduate Planning Program, Adjunct Professor (1988-1999)

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### AWARDS

Andrew Haswell Green Award for Distinguished Service, 2009, APA New York Metropolitan Chapter

#### NASSAU COUNTY COMPREHENSIVE MASTER PLAN UPDATE

Nassau County, New York

#### ROUTE 25A COMMUNITY VISIONING LAND USE PLAN

Town of Brookhaven, New York

#### HEMPSTEAD NEIGHBORHOOD IMPROVEMENT PLAN

Hempstead, New York

#### NORTH HEMPSTEAD MASTER PLAN

North Hempstead, New York

#### ROCKVILLE CENTRE CODE REVISION

Rockville Center, New York

#### COLD SPRING HARBOR LABORATORY

Laurel Hollow, New York

#### GARDEN CITY ZONING STUDY OF COUNTY PROPERTIES

Garden City, New York

#### NY RISING COMMUNITY RECONSTRUCTION PROGRAM

New York

#### MAMARONECK MASTER PLAN UPDATE

Mamaroneck, New York

#### PAWLING MASTER PLAN AND ZONING CODE

Pawling, New York

#### CROTON-ON-HUDSON COMPREHENSIVE PLAN

Village of Croton-on-Hudson, New York

#### PORT CHESTER COMPREHENSIVE PLAN AND ZONING CODE UPDATE

Village of Port Chester, New York

#### TARRYTOWN WATERFRONT

Tarrytown, New York

#### TUCKAHOE ZONING CODE REVISIONS

Village of Tuckahoe, New York

#### REVLON PROPERTY SITE PLAN REVIEW

Village of Tuckahoe, New York

#### YONKERS HOUSING REVITALIZATION STRATEGY

Yonkers, New York

#### BRONXVILLE MASTER PLAN AND ZONING ORDINANCE UPDATE

Bronxville, New York

#### CROTON-ON-HUDSON COMPREHENSIVE PLAN

Village of Croton-on-Hudson, New York

#### SCARSDALE FREIGHTWAY SITE REDEVELOPMENT STUDY

Scarsdale, New York

# Jonathan Martin Ph.D., AICP

## ASSOCIATE PRINCIPAL



Jonathan Martin is an urban designer with more than 20 years of experience in community planning and project management. He leads BFJ's design practice, contributing expertise in site planning, design guidelines and interactive community engagement. Mr. Martin is also a professor in graduate programs at Pratt Institute and Columbia University.

### PROJECT EXPERIENCE

#### EDUCATION

Bachelor of Science in Architecture,  
Arizona State University

Master of Regional Planning, Cornell  
University

Ph.D. in City and Regional Planning,  
Cornell University

#### REGISTRATION

American Institute of Certified Planners

#### MEMBERSHIPS

New York Metro Chapter of the American  
Planning Association

Association of American Geographers

Association of Collegiate Schools of  
Planning

National Low Income Housing Coalition

#### TEACHING AND PROFESSIONAL DEVELOPMENT

Professor, Pratt Institute Center  
for Planning and the Environment,  
2006-present

Adjunct Professor, Columbia University  
Department of Urban Planning,  
2006-present

#### AWARDS

Japan Foundation Center for Global  
Partnership Education Grant, 2011

#### FACILITATION PROCESS TO INFORM A VISION FOR SOHO/NOHO ZONING

New York, New York  
Role: Planning Facilitator

#### FACADE IMPROVEMENT PROGRAM

Farmingdale, New York  
Role: Project Manager

#### COMPREHENSIVE PLAN UPDATE

Beacon, New York  
Role: Urban Designer

#### TRANSIT-ORIENTED DEVELOPMENT STUDY

Branford, Connecticut  
Role: Urban Designer

#### FREIGHTWAY SITE REDEVELOPMENT STUDY

Scarsdale, New York  
Role: Urban Designer

#### DOWNTOWN TRANSIT-ORIENTED ZONING

Pleasantville, New York  
Role: Urban Designer

#### COMPREHENSIVE PLAN UPDATE

North Castle, New York  
Role: Urban Designer

#### NEIGHBORHOOD PLANS

Old Greenwich/Riverside/North Mianus and  
Glenville/Pemberwick  
Greenwich, Connecticut  
Role: Urban Designer

#### GARDENS AT HARRIMAN

Harriman, New York  
Role: Urban Designer

#### SITE DESIGN ALTERNATIVES STUDY FOR PROPOSED SANITATION GARAGE

New York, New York  
Role: Project Manager

#### SITE DESIGN FOR PROPOSED WAREHOUSE DISTRIBUTION CENTER

New York, New York  
Role: Urban Designer

#### SEAPORT REDEVELOPMENT WORKING GROUP

New York, New York  
Role: Facilitator

#### LOCAL WATERFRONT REVITALIZATION PLAN

Port Chester, New York  
Role: Urban Designer

#### COMMUNITY IMPACTS STUDY OF ZONING FOR QUALITY AND AFFORDABILITY (ZQA) ZONING PROPOSALS

New York, New York  
Role: Project Manager

#### MELVILLE EMPLOYMENT CENTER PLAN

Huntington, New York  
Role: Urban Designer

#### COMPREHENSIVE DOWNTOWN REVITALIZATION PLAN\*

Farmingdale, New York  
Role: Project Manager

#### DOWNTOWN LARGE-SCALE URBAN AND WATERFRONT DEVELOPMENT\*

Yonkers, New York  
Role: Project Manager

#### HEMPSTEAD TURNPIKE CORRIDOR PLAN\*

Elmont, New York  
Role: Urban Designer

#### TOWN-WIDE DESIGN GUIDELINES\*

Town of Newburgh, New York  
Role: Urban Designer

\* Designates work completed prior to joining BFJ Planning.

# Emily Junker

PROJECT MANAGER



Emily Junker recently joined BFJ, bringing a diverse background in planning, policy, marketing, and academia. She has experience in strategic planning, community engagement, and graphic rendering and analysis. Prior to BFJ, Ms. Junker worked for Columbia University’s Graduate School of Architecture, Planning, and Preservation, as well as the National Trust for Historic Preservation and several planning and architecture firms.

## PROJECT EXPERIENCE

**COMPREHENSIVE PLAN UPDATE**  
Riverhead, New York  
Role: Project Planner

**JEWISH COMMUNITY CENTER OF WESTCHESTER, PARKING STUDY**  
Westchester, New York  
Role: Project Planner

**BROWNFIELD OPPORTUNITY AREA NOMINATION AND APPLICATION FOR DESIGNATION**  
Staten Island, New York  
Role: Project Planner

**COMPREHENSIVE PLAN**  
Sea Cliff Village, New York  
Role: Project Planner

**MASTER PLAN**  
Edison Township, NJ  
Role: Project Planner

**COLUMBIA UNIVERSITY, GRADUATE SCHOOL OF ARCHITECTURE, PLANNING AND PRESERVATION, ASSISTANT DIRECTOR, URBAN PLANNING \***  
New York, New York

**COLUMBIA UNIVERSITY, GRADUATE SCHOOL OF ARCHITECTURE, PLANNING AND PRESERVATION, TEACHING ASSISTANT \***  
New York, New York

**SUNY EMPIRE STATE COLLEGE, HARRY VAN ARSDALE SCHOOL OF LABOR STUDIES, ADJUNCT LECTURER \***  
New York, New York

\*Experience prior to joining BFJ Planning

## EDUCATION

New York University, Tisch School of the Arts, Bachelor of Art

Columbia University Graduate School of Architecture, Planning and Preservation, Master of Science in Urban Planning and Master of Science Historic Preservation

## MEMBERSHIPS

American Planning Association  
Member, New York Metro Chapter  
Member, Connecticut Chapter

National Trust of Historic Preservation  
Preservation Alumni

AICP Candidate

# Mark Freker

PLANNER



**M**ark Freker is a planner with a range of experience, focusing on land use planning, community engagement, and transportation planning. He has more than five years of experience in both planning and public health work in urban and suburban contexts, with projects including development studies, transportation plans, land use analysis and public health research.

## PROJECT EXPERIENCE

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### EDUCATION

Bachelor of Arts in Public Health,  
Beloit College

Master of Science in Urban Planning,  
Pratt Institute

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#### STAMFORD CITYWIDE PARKING STUDY

Stamford, Connecticut  
Role: Project Planner

#### OSSINING COMPREHENSIVE PLAN

Ossining, New York  
Role: Project Planner

#### PRINCETON FORRESTAL CAMPUS TRAFFIC IMPACT STUDY

Princeton, New Jersey  
Role: Project Planner

#### PRINCETON UNIVERSITY EAST CAMPUS TRAFFIC IMPACT STUDY

Princeton, New Jersey  
Role: Project Planner

#### PRINCETON FORRESTAL CAMPUS SHUTTLE STUDY

Princeton, New Jersey  
Role: Project Planner

#### TOWNSHIP OF PARSIPPANY-TROY HILLS, NJ MASTER PLAN

Passippany-Troy Hills, NJ  
Role: Project Planner

#### TRAFFIC IMPACT STUDY FOR ACQUEST DEVELOPMENT

Mount Pleasant, New York  
Role: Project Planner

#### DOWNTOWN PLEASANTVILLE PARKING STUDY

Pleasantville, New York  
Role: Project Planner

#### NEW YORK CITY NON-RESIDENTIAL PARKING STUDY

New York, New York  
Role: Project Planner

#### FACILITATION PROCESS TO INFORM A VISION FOR SOHO/NOHO ZONING

New York, New York  
Role: Project Planner

#### CENTRAL BROOKLYN COMMUNITY HEALTH STRATEGY PLAN, INTERFAITH HOSPITAL\*

Brooklyn, New York  
Role: Co-Facilitator

#### BROOKLYN BRIDGE PARK PIER 3 WATERFRONT CAPITAL PLANNING\*

Brooklyn, New York  
Role: Capital Intern

#### VILLAGE OF OSSINING HOUSING STUDY\*

Ossining, New York  
Role: Project Planner

#### PHILADELPHIA VACANT LOT STUDY\*

Philadelphia, PA  
Role: Research Coordinator

\* Designates work completed prior to joining BFJ Planning.



# **WORK SAMPLES AND RELEVANT EXPERIENCE**

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## WORK SAMPLES

The following work samples and links show recent comparable comprehensive planning work for communities in New York.

- **Southampton Village Comprehensive Plan**

<https://southamptonvillage.org/DocumentCenter/View/1379/VofSouthampton-Comp-Plan-Adopted---092122>

- **North Castle Comprehensive Plan**

[https://www.northcastleny.com/sites/g/files/vyhlif3581/f/uploads/2018\\_comprehensive\\_plan\\_amended\\_2\\_6-12-19-compressed.pdf](https://www.northcastleny.com/sites/g/files/vyhlif3581/f/uploads/2018_comprehensive_plan_amended_2_6-12-19-compressed.pdf)

- **Bayport Zoning Study**

<https://islipny.gov/community-and-services/documents/planning-development/1180-adopted-bayport-zoning-study/file>

- **Mount Kisco Comprehensive Plan**

[https://cms6.revize.com/revize/mountkisco/departments/village\\_manager/docs/2019-01-11\\_MountKisco\\_ComprehensivePlan\\_FinalVersion%20\(1\).pdf](https://cms6.revize.com/revize/mountkisco/departments/village_manager/docs/2019-01-11_MountKisco_ComprehensivePlan_FinalVersion%20(1).pdf)

The following pages describes other projects that show our experience related to this Comprehensive Planning effort.

## RELEVANT WORK

### SOUTHAMPTON VILLAGE COMPREHENSIVE PLAN

#### SOUTHAMPTON, NEW YORK

BFJ worked with the Village to update its Comprehensive Plan. The prior Plan was also developed by BFJ in 2000.

The prior plan focused on issues such as traffic and congestion, summertime crowding, and changing retail that favored higher-end shops. Some of the main issues this Plan focuses on are revitalization strategies for the Village Center, zoning recommendations to preserve the residential fabric, largely through regulations that discourage



“tear-downs,” addressing community support for potential reuse of the Stony Brook Southampton Hospital site, strategies to improve pedestrian and bicycle infrastructure, addressing the lack of housing diversity and workforce housing, preservation of the natural environment, and becoming a more sustainable community. The plan placed an emphasis on the identification and vetting of specific zoning recommendations which were necessary to address these issues.

### RIVERHEAD COMPREHENSIVE PLAN UPDATE

#### RIVERHEAD, NEW YORK

In 2023 BFJ began work with the Town of Riverhead to complete its Comprehensive Plan. The planning process began in 2020 but had since stalled. The Comprehensive Plan will provide strategies that address economic development, farmland preservation and the agricultural economy, housing, revitalization of Main Street and Hamlet centers, transportation, sustainable development, climate resiliency, and natural resource preservation and water quality. The plan will address the the significant amount of development anticipated in the downtown core as well as new investments from the state through the Downtown Revitalization Initiative, and other sources.



## RELEVANT WORK

### ROUTE 25A LAND USE PLAN AND COMMUNITY VISIONING

#### Town of Brookhaven, New York

During the last 40 years, the character of the 10-mile long Route 25A corridor between Mount Sinai and Wading River has changed due to increases in population and development. BFJ Planning worked with five hamlets along the corridor on a Land Use Plan that addressed the above issues. The focus of the Plan was to create an overall zoning and land use strategy that would make the Route 25A corridor more environmentally and economically sustainable. BFJ held a series of community planning forums, which helped guide participants through a process of conceptual thinking to the identification of priorities and a vision for each individual hamlet and the corridor as a whole. As a result, the Land Use Plan created three new zoning overlay districts that preserve the unique qualities of each hamlet, guide future growth to existing centers, and protect the corridor's remaining farms and open space.



### ROUTE 25A VISIONING STUDY FOR STONY BROOK, SETAUKET AND EAST SETAUKET

#### Town of Brookhaven, New York

BFJ Planning assisted the Town of Brookhaven develop a Vision Report for the Route 25A corridor in the hamlets of Stony Brook, Setauket and East Setauket. Over the last 40 years, the corridor and surrounding environs had lacked an overall vision. As a result, planning had been reactionary rather than proactive. Higher than normal increases in population and development applications, and the current function of the corridor have led to increases in traffic congestion that have had adverse impacts on local businesses and the environment. As a result, there were a myriad of strip centers and single-use and underutilized properties that weren't sustainable. The Vision Report is the first step in the Town's effort to plan for the corridor in a way that will meet the current needs of each hamlet and anticipate the impacts of growth.



### WADING RIVER ROUTE 25A

#### Riverhead, New York

BFJ Planning worked with the Town of Riverhead to provide a selective update to the Riverhead Comprehensive Plan for the Route 25A corridor in Wading River, Suffolk County, NY. The goals of the study identified potential development parcels, guide future development in a sustainable way, balance conservation and development/economic development, preserve community character and open space, and promote standards for a high quality of life for Wading River's residents. The plan update acted as the framework for zoning changes.

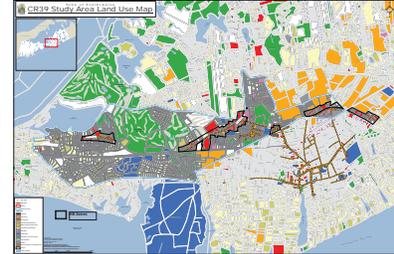


## RELEVANT WORK

### COUNTY ROAD 39 MARKET STUDY

#### TOWN OF SOUTHAMPTON, NEW YORK

County Road 39 is the main east-west thoroughfare within the Town of Southampton, and also serves as the “Gateway to the Hamptons,” providing primary access into many of the Town’s hamlets. Traffic congestion is a recurring issue and is particularly acute during the summer months, when the Town’s population nearly triples. The Town retained BFJ Planning to conduct an analysis of the appropriate land use mix to achieve the most beneficial development pattern for CR 39. The study evaluated uses contemplated in the Highway Business zoning district, to determine whether any changes to those uses were needed to meet long-term planning objectives and capture market potential. The analysis identified several areas of market strength and potential spending leakages, and made recommendations on additional uses as special exception uses in the HB district.



### PLANNING ADVISORY SERVICES SAVE SAG HARBOR, INC

#### SAG HARBOR, NEW YORK

BFJ Planning was retained by a citizen’s group to research methods to control the location of national chain retail businesses, often referred to as “formula” retail, as part of the group’s mission to preserve the Village of Sag Harbor’s small-scale character. BFJ created a compendium of selected ordinances, policies and planning articles related to the control of formula retail, primarily through local land development regulations. This work was intended to provide examples of different approaches from comparable communities that have sought to preserve and promote their traditional downtown character. The compendium was submitted to Save Sag Harbor to further its advocacy of revisions to the Village’s commercial zoning code.



### BAYPORT ZONING STUDY

#### TOWN OF ISLIP, NEW YORK

The Town of East Hampton, on Long Island’s South Fork, retained BFJ Planning to develop plans for its four business areas of Amagansett, Wainscott, Montauk and Springs. The work entailed urban design, transportation and zoning analysis, as well as preparing an inventory of existing retail and other land use development. Proposals included recommendations for urban design improvements, opportunities for new development, guidelines for preserving positive assets, and zoning changes to implement the land use recommendations.



## RELEVANT WORK

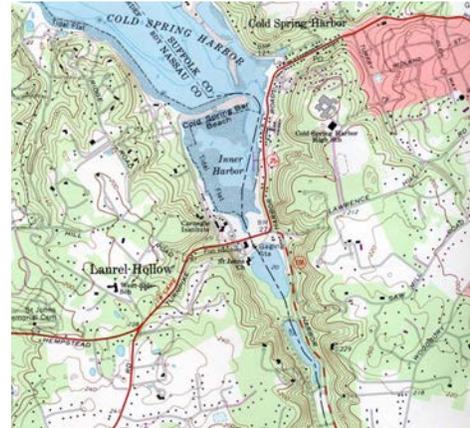
# COLD SPRING HARBOR LABORATORY ENVIRONMENTAL IMPACT STATEMENT

## LAUREL HOLLOW, NEW YORK

Cold Spring Harbor Laboratory is an internationally renowned research institution located on Long Island's North Shore. The laboratory campus, listed on the National Register of Historic Places, incorporates high-level scientific research facilities and residential buildings in a rural, campus-like setting.

BFJ Planning prepared a Generic Environmental Impact Statement (GEIS) for proposed future projects, as well as site-specific plans for a childcare center. The GEIS included detailed technical analyses of environmental, socioeconomic, and fiscal impacts; a historical overview of the Laboratory's development; its relationship with the Village; and the scientific purpose of the proposed future projects.

As Cold Spring Harbor Laboratory continued to expand their facilities, they retained BFJ to bring a proposed 180,000 sf development project through the required State Environmental Quality Review (SEQR) process, including scoping, preparation of the Draft and Final EISs, Findings Statement, and related documents and approvals. The EIS addressed all potential environmental impacts associated with the proposed expansion, which included housing for students and visitors, six research laboratories, archive and library buildings, and permanent graduate school offices.



# NASSAU COUNTY COMPREHENSIVE MASTER PLAN

## NASSAU COUNTY, NEW YORK

BFJ Planning worked with Nassau County, Long Island to develop a Master Plan to address the many interrelated land use, environmental, socioeconomic, infrastructure and transportation issues facing the County over the next twenty years. The plan focused on key resident concerns such as the need to preserve the character of residential neighborhoods, parks, low crime and great schools, while addressing the formidable challenges of high property taxes, retention of young people, traffic congestion and underserved communities. The Master Plan provided an action plan for achieving a sustainable future for the county's residents and businesses.



## RELEVANT WORK

# DOWNTOWN REVITALIZATION INITIATIVE STRATEGIC INVESTMENT PLANS

## NEW YORK STATE

BFJ Planning has been retained by the Department of State to lead a multidisciplinary team in developing Strategic Investment Plans for the downtown areas of five communities in the State's Regional Economic Development Councils. The Plans are part of Governor Andrew Cuomo's Downtown Revitalization Initiative (DRI), which provides planning and financial support to help transform selected communities ripe for development. As part of the initiative, now in its fourth round, each community is awarded \$10 million to fund projects that will best spur and leverage growth.

The Plans include a vision as established by the community and an implementation strategy, which details candidate projects with information about funding, potential partners and timeframe for implementation. BFJ completed two plans in Round 1 of the DRI Program (Glens Falls, Capital Region, and Middletown, Mid-Hudson region); one in Round 2 (Watkins Glen, Southern Tier region); and one in Round 3 (Owego, Southern Tier); and is currently working on the Round 4 DRI project in Peekskill (Mid-Hudson region). In each community, BFJ worked closely with committees comprised of local residents, business leaders, and municipal officials. The community-based planning process included extensive meetings with the local committee, multiple public workshops with a diversity of stakeholders, and frequent coordination with governmental agencies.



Glens Falls, Warren County, New York



Watkins Glen, Schuyler County, New York



Middletown, Orange County, New York

# NEW YORK RISING COMMUNITY RECONSTRUCTION PLANS

## NEW YORK STATE

BFJ Planning was part of a multidisciplinary team hired by the Governor's Office of Storm Recovery (GOSR) to develop reconstruction plans for communities impacted by Hurricane Sandy. The Community Reconstruction Plans identified projects backed by CDBG-DR funding for implementation in areas hit hardest by Sandy. BFJ completed one plan in Staten Island, three in Nassau County, one in the Gravesend and Bensonhurst neighborhoods of Brooklyn and another in Southeast Queens ("Idlewild Watershed Communities"). In each of these communities, BFJ worked closely with committees made up of local residents, business leaders and activists. The community-based planning process included extensive meetings with the local committees, multiple public workshops with a diversity of stakeholders and frequent coordination with multiple governmental agencies.



## NEIGHBORHOOD PLANS

### Greenwich, CT

Cos Cob, Eastern Greenwich (Old Greenwich, Riverside, North Mianus), Glenville and Pemberwick

Over a period of several years, the Town of Greenwich, Connecticut retained BFJ Planning to create neighborhood plans for several areas within Greenwich that developed as distinct communities. For each of the three plans, the most recent of which was adopted in 2017, the process included working closely with the public to ensure that recommendations reflected the goals of the residents and the Town. For Cos Cob, substantial attention was dedicated to existing urban design conditions and the plan presented a variety of strategies to improve the character of the “Hub” and the Route 1 corridor in order to promote a more attractive and pedestrian-friendly environment. For Eastern Greenwich, key issues identified included enhancing the Old Greenwich business area, addressing issues of out-of-scale residential development, and increasing public access to the Mianus River. For the Glenville/Pemberwick area, the focus was on improving two important community assets: Glenville Green and Pemberwick Park, including establishing a stronger connection to the Byram River.



Cos Cob Neighborhood Plan

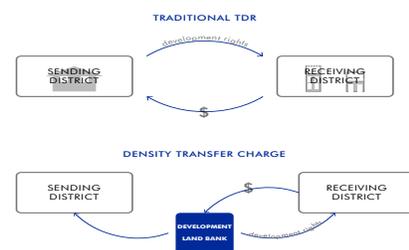


Glenville/Pemberwick Neighborhood Plan

## TDR TOOLBOX FOR NEW YORK STATE MUNICIPALITIES

NYSERDA, NYSDOT, New York State

BFJ Planning secured joint funding from the New York State Energy Research and Development Authority (NYSERDA) and New York State Department of Transportation (NYSDOT) to develop a TDR Toolkit for New York State Municipalities. The objective of this project was to demonstrate the benefits that Transfer of Development Rights (TDR) can have in encouraging efficient land use and reducing vehicle miles of travel by combining TDR programs with transit oriented development. The project explored the benefits of supporting additional land use planning objectives such as preservation of agricultural land, conservation of sensitive environmental areas and replacement of housing units in flood zones. The TDR Toolbox provided resources to help New York State municipalities implement TDR programs, including background information on TDR types and components, step-by-step process for planners and municipalities to implement TDR programs and a description of transfer mechanism options. The TDR Toolbox concluded with the production of two demonstration projects in partnership with municipalities to provide case studies for how New York State communities can implement a TDR program. Demonstration Projects were conducted in partnership with the Town of Canandaigua and the Town of Stillwater



### **NORTH CASTLE COMPREHENSIVE PLAN**

North Castle, New York

In 2017, the Town of North Castle, New York, retained BFJ Planning to update its 1996 Comprehensive Plan, to incorporate the community’s goals and policies regarding commercial vitality, housing, open space, community facilities and infrastructure. Particular attention was sought for ensuring the continued strength of North Castle’s non-residential areas, including the hamlet centers, office zones and industrial areas.

North Castle, a town of nearly 12,000 residents located in the central portion of Westchester County, has three hamlet areas, Armonk, North White Plains, and Banksville, that are geographically separated from each other by the New York City reservoir system and that each have a distinct land use character. Targeted recommendations were made for each of these areas, as well as for the Town overall, with a focus on preserving North Castle’s strong residential neighborhoods and historic and environmental assets. Key recommendations included undertaking a comprehensive transportation study of a major corridor, addressing critical water supply issues and implementing infrastructure improvements to address stormwater management and flooding issues.



### **PINE PLAINS COMPREHENSIVE PLAN**

Pine Plains, New York

Pine Plains is a rural Town in northeast Dutchess County that is well-known for its scenic beauty and agricultural landscape. It has a historic hamlet center with local retail, restaurants, and services. In 2019, the Town requested consultant services to update its 2004 Comprehensive Plan. As part of the Comprehensive Plan Update process, BFJ Planning reviewed conditions in the Town and worked with the Comprehensive Plan Update Committee to identify issues related to conservation, housing, traffic and transportation, and demographics. Other key focus areas include making the zoning code more flexible for residential and commercial uses, strengthening protections for sensitive resources, and expanding recreation opportunities for residents and tourists.



Public engagement with the Pine Plains community was crucial to creating a successful plan. BFJ Planning led the public engagement process which included an interactive workshop, survey, and public hearing.



# **UNDERSTANDING OF SHELTER ISLAND**

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## PROJECT UNDERSTANDING

The Town of Shelter Island is seeking consultant services to complete an update of its Comprehensive Plan. A significant amount of work has been completed in the past couple of years, and professional experience is needed to polish the plan, test recommendations with the community, revise recommendations as needed, and develop an implementation strategy to meet town-wide planning goals.

We understand that Shelter Island is a unique community, which attracts people looking for a sense of privacy, intimacy and scale. The planning challenges facing Shelter Island are diverse and complex. We have read through the draft chapters prepared in this current effort. As a volunteer-prepared document, the draft has benefited from a highly localized and tailored approach that resulted in visionary and very specific recommendations. This planning effort will build upon this effort and other prior efforts such as the 2009 Plan, to attain a level of actionable strategies and recommendations that respond to specific issues and that can be implemented based on the Town's local capacity. BFJ Planning has a very successful record in making sure that plans are community-driven and are ultimately adopted.

Shelter Island has seen significant residential growth since 2008, when the last plan was produced. Residences are predominantly single family, on one- or two-acre minimum zoned lots. The Town has seen a significant number of “knock-downs” of smaller and older homes. The Town could see further growth with the continued development of remaining vacant land, conversion of one to two-family dwellings or the addition of accessory units where allowed. BFJ Planning has extensive experience tailoring zoning recommendations (allowed uses, bulk requirements, new zones, etc.), particularly for lower-density communities such as Shelter Island.

Shelter Island is also a naturally occurring retirement community, and many residents are sensitive to the high cost of living and the pressures of development and change. The Plan will need to manage future growth in a way that meets the needs of current and future residents while also preserving affordability, neighborhood quality-of-life, housing scale, and protecting natural resources, scenic vistas, and water quality.

The Plan will need to address how to encourage sustainable economic growth, particularly in light of



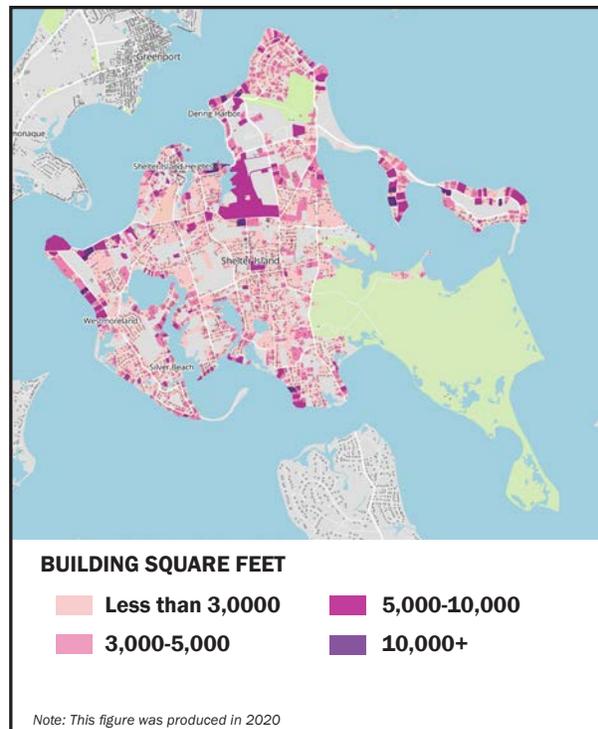
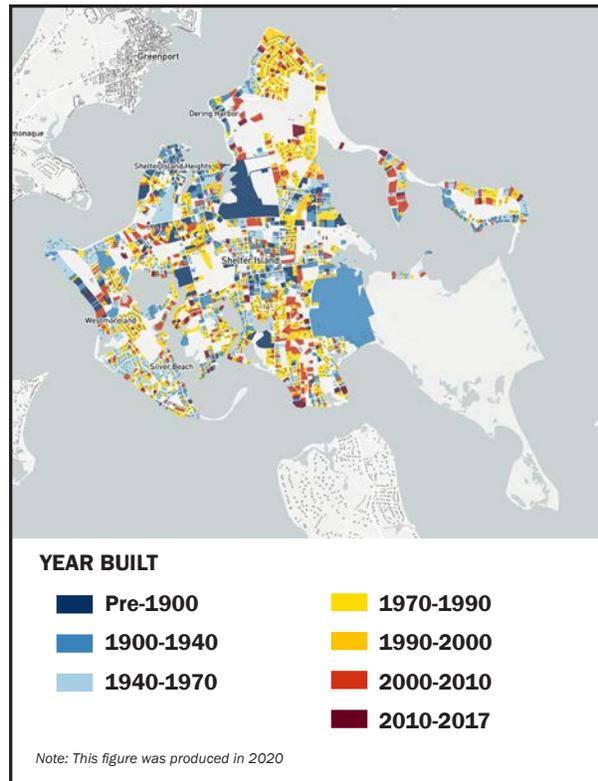
Commercial area in Dering Harbor

the fact that demand for most services is seasonally driven and the cost for goods and services is relatively high. Commercial areas (B and B-1 zones) can be found primarily along Route 114. As stated in the 2009 Plan, the business areas encompass a relatively large area and is inviting for strip zoning development. The Plan would consider areas along Route 114 where hamlet-scale commercial growth should be focused.

Approximately 38 percent of the town's land is reserved for recreation and open spaces, with 2,000-plus acres within The Nature Conservancy's Mashomack Preserve. These natural resources are a key aspect of Shelter Island's rural seaside charm and intimate island character. Preserving and planning for stewardship of these resources will be a priority as much for preserving community character as a matter of practical necessity: residents draw household water from wells that tap into natural groundwater, and almost everyone depends on the natural process of purification to accommodate septic. A map on the following page shows areas with private and commercial water supply.

Unfortunately, development pressure is greatest in the aquifer's most sensitive areas: along the shoreline and outlying peninsulas. Therefore, any future plan for Shelter Island should seek to preserve its trees, water, wetlands and open space through a coordinated framework of land use controls aimed at managing growth, supported by policies and other regulatory elements that work in concert to ensure the future sustainability.

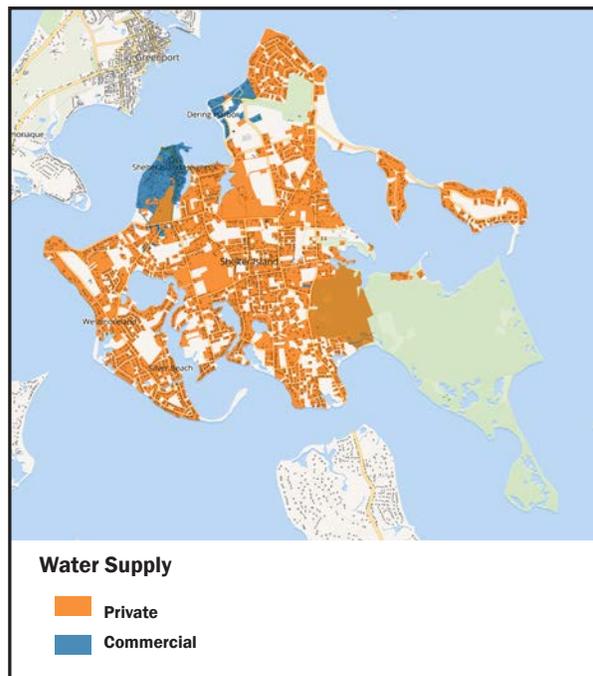
Lastly, the Comprehensive Plan Update will also address governance issues, including the need to modernize and streamline processes, improve methods of information sharing, and better leverage investment of public and private funds.



*We use an innovative toolbox of community engagement strategies to ensure meaningful input from stakeholders*

A hallmark of our proposal includes new virtual engagement tools, social media strategies, and tools to conduct meaningful online public events so that we can continue to hear from the community in the age of social distancing. Examples of these tools are shown on the next page. We can use a mix of traditional outreach methods and newer strategies such as surveys, in-person real-time electronic polling and social media, to reach people where they are and get the most information as possible from our interactions. We have found that providing engaging exercises in the survey such as mapping exercises and “idea walls” helps to solicit feedback in a way that is fun for participants. We feel this approach is necessary in given the constraints to traditional in-person public outreach presented by the Coronavirus pandemic. Web-based activities will also help to capture priorities for those residents that are seasonal and are not able to attend in-person meetings.

Our scope and fee reflects the specific strategies identified. However, we will work closely with the Town to tailor the most appropriate and effective engagement strategies for this project, and can adjust the scope and fee accordingly.



Sylvester Manor  
Source: Art and Architecture Quarterly



Shelter Island Heights (Shelter Island Hardware)

## Web-Based Tools

**BFJ Planning offers an integrated web-based platform (using Social Pinpoint) for public engagement, made up of the following components:**

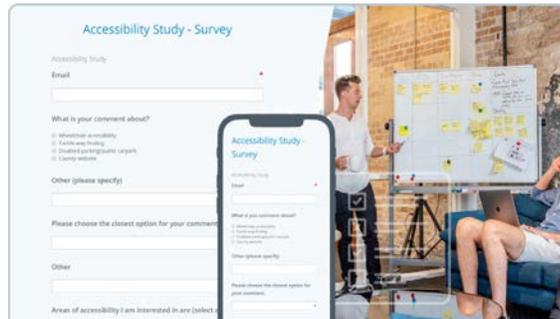
### Project Page

We can develop a project page on our platform or work with you to put it on your site. The page would be mobile friendly and could incorporate a variety of tools including engagement tools, engagement event information, documents, and comment forms.



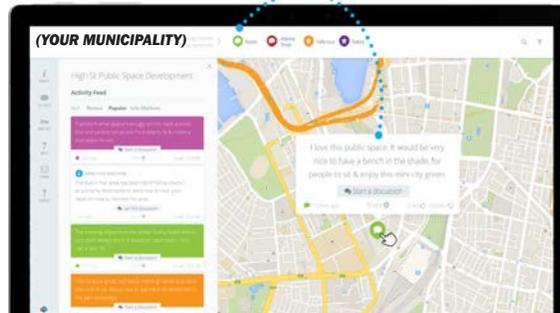
### Public Surveys

Surveys will help to capture and quantify sentiments on community priorities. The surveys are mobile friendly, easy to use, and can be imbedded directly in website or on a standalone page.



### Location Based Engagement

Increase the quality of your data by letting your community show you exactly where their feedback, ideas and concerns relate.



### Crowdsourced Engagement (Ideas Wall)

Bring your 'sticky-notes on a wall' concept to life with our online brainstorming tool. The online ideation tool is a helpful way to manage internal collaboration or to get your community involved in your next project.



*Images provided by Social Pinpoint*

*We bring the experience needed to complete an effective and engaging plan for Shelter Island*

The BFJ Team has decades of planning experience at a range of scales, from large cities to rural hamlets to individual sites. While Shelter Island is unique in many ways, we have worked in many communities of comparable rural scale throughout the region. We will be able to jump in and quickly engage the relevant stakeholders and decision-makers. In addition, we believe the planning process should avoid “cookie-cutter” recommendations and over-generalized best practices. We will approach this project with a fresh perspective, a focus on identifying the real underlying issues and challenges, and tailoring innovative solutions unique to the circumstances.

In addition, our experience has also shown that it is important to create a final document that is well organized and highly graphic, so that it is accessible by the layperson as well as Town staff and municipal boards. Our Team includes staff with expertise in a range of graphic disciplines, from GIS for mapping and analysis, to graphic computer programs and freehand drawings to illustrate design concepts, to document layouts that clearly convey planning policies and strategies. We strongly believe that plans must be graphically rich in order to be user-friendly and avoid “sitting on a shelf.”

Increasingly, we have recognized that the focus on graphic presentation extends to the organization of the plan document itself. Utilizing a traditional approach in which planning topics are each discussed in an individual chapter, can lead to plans that are encyclopedic and separated into silos. The traditional approach also tends to result in long plans. We propose to utilize a more thematic approach. The existing condition chapters would begin with a concise snapshot of where Shelter Island is today and what has changed in the past 10-years, in terms of socioeconomics, land use and development, infrastructure and the environment, and housing. The



Shelter Island Yacht Club



Plan would be heavily graphic, with select charts and illustrations, rather than lengthy text, used to depict key concepts. The key is not an exhaustive description of the Town, but instead a focus on how the Town has changed and what that means for the future. Issues and opportunities will be the primary areas of discussion, rather than existing conditions.

In conclusion, we are very excited about the opportunity to collaborate with the talented and energetic people living and working in Shelter Island. Our inclusive, community-based approach to planning – one that BFJ Planning has built its reputation upon – will ensure consistency in purpose, efficiency in implementation and a final product that accurately reflects the people’s aspirations for their community. We believe we have earned a reputation for client loyalty and commitment to seeing even the most challenging project through to completion.



Shelter Island Historical Image  
Source: New York Public Library



# **METHODOLOGY AND APPROACH**

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## SCOPE OF WORK

We describe below our proposed technical approach to the project based on our understanding of the Request for Proposal (RFP) and our past experience in comparable projects. However, the BFJ Team is flexible on this proposal based on feedback from the Town and further discussion.

The timetable presents the schedule for completing all of the work items identified; we have assumed an approximately 8-month process. This project duration is consistent with our experience in comprehensive plans of comparable scope and scale, and we believe it represents an efficient yet effective approach that will ensure the project maintains momentum. The timeline incorporates the time required to begin the SEQR process. The project assumes a Negative Declaration; however, if it is determined that this plan would have significant environmental impacts (Positive Declaration) and a GEIS is required, that work would be provided under a separate scope of services.

The work program also includes a schedule of meetings, for which we propose the following:

- A total of 7 meetings with the Comprehensive Planning Task Force (CPTF), commencing with a project kick-off meeting.
- Three meetings with the Comprehensive Plan Advisory Committee (CPAC), scheduled at key moments in the timeline.
- Two (2) public workshops, one of which will serve as the CPTF's public hearing.
- One (1) online interactive survey

- One (1) meeting and (1) public hearing of the Town Board.

As described below, it is anticipated that most of the meetings with the CPTF and CPAC could be virtual, via Zoom or a similar platform.

The BFJ Team agrees to all of the required work tasks as listed in the RFP. We have endeavored not to repeat every item, but to indicate our overall approach to each task. The project scope described below seeks to work within the overall framework outlined in the RFP, but to provide additional detail within the broad tasks identified by the Town. For clarity, below is a summary of how our proposed scope aligns with the RFP tasks:

### TASK 1 – COMMUNITY ENGAGEMENT

#### Task 1.A Community Engagement Plan

BFJ will develop a Community Engagement Plan (CEP) in coordination with the CPTF. Our approach is to identify a wide range of strategies to reach out to the public, disseminate information, and provide diverse opportunities for participation in the planning process.

The CEP will include a range of outreach methods to ensure maximum exposure and representative participation. Specific methods are summarized in the tasks below. A key outcome of the CEP will be identifying stakeholders to involve in the planning process, such as neighborhood associations, civic, and non-profit organizations. We understand that much of this work has already been undertaken by the Town



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as part of the creation of the CPAC and other ongoing outreach activities.

Early on in this process, we also expect to work with CPTF on a series of online strategies to gather public input. We have found online meetings to be very effective in capturing people that don't typically show up for public meetings. Virtual engagement may be critical in capturing feedback from residents who are seasonal and are not in town during the week.

The BFJ Project Manager will be the point person for management and implementation of the CEP, working in coordination with the BFJ Team and Town staff. The CEP will be comprehensive but also flexible to allow for adjustments as the project advances to meet needs that are identified during the process.

#### **Communication Methods**

BFJ will assist the Town to publicize events in a variety of ways such as:

- Developing flyers which can be distributed in print or via email.
- Press releases for public engagement events
- Coordination on posting meeting dates and deliverables to the Town's website and social media accounts.

#### **Website**

We understand that a website has already been created for Comprehensive Plan related materials. BFJ Planning will work with the Town to provide additional content on a regular basis, which would include a calendar of public workshops, key deliverables, and a comment/question form. It could also provide access to surveys and web-conference meetings which would help expand the reach of our outreach efforts, engage a variety of demographic and age groups, and encourage participation from those who may not be interested in or able to participate in public meetings.



#### **Task 1.B Town Board Comprehensive Planning Task Force (CPTF) Meetings**

Overall direction, policies, and decisions during the planning process will be solicited through the CPTF. The committee will generally provide feedback on draft products before distribution to a broader range of stakeholders and the general public. The committee will collaborate with Town staff and the BFJ Team through approximately monthly meetings to share and review draft deliverables as they are developed. The role of the committee is to use their expertise to provide insights for discussion at meetings, assist in outreach by identifying key stakeholders and helping to publicize events, and provide feedback on draft deliverables.

At CPTF meetings, BFJ will provide updates on the planning process, debrief on community engagement events, and prepare for upcoming events. It is anticipated that all CPTF meetings would be done virtually with the exception of the first meeting which would be done in coordination with a site visit. Core members of the BFJ Team will attend all committee meetings, with attendance by other members of the team as appropriate. For each meeting, BFJ will prepare an agenda, relevant materials and handouts, and a meeting summary.

### Task 1.C Comprehensive Plan Advisory Committee (CPAC)

We understand that the Comprehensive Plan Advisory Committee will be a group of civically minded residents that will be called upon to help guide the “big picture” vision for the plan. We will meet with this group at three different key milestones to check in, solicit input, and vet recommendations. We will also call upon the CPAC to help spread the word about the Plan including the public outreach events. It is anticipated that these meetings would be held virtually.

### Task 1.D Community-wide Workshops

Public workshops give us an opportunity to meet and hear directly from Islanders and members of the Shelter Island community. We use them throughout the process to create a vision for the plan, identify issues and opportunities, test design concepts, and present action items so that we can get feedback before finalizing the plan. Public workshops will be documented in meeting summaries that will be reviewed by the project team and included as appendices in the final report.

We propose to conduct two public workshops, the second of which will serve as a public hearing for the CPTF as required during preparation of the plan.

It is anticipated that the first workshop will be held in-person. We are flexible to conduct the 2nd workshop in person or virtually. For the virtual meetings, BFJ can use Zoom’s webinar tool to host a “town hall”-type meeting. This would allow us to begin with a presentation before turning the floor over to participants to ask questions or comment. The tool gives the flexibility to allow participants to “raise their hand,” in which case we could un-mute them to comment verbally. Or, participants could submit written questions during the course of the meeting and we could respond verbally or in writing during a comment period at the end. The more interactive elements of a public workshop – such as small group discussions and open house stations – can also be taken online using the Social Pinpoint platform. In this scenario, we could create moderated discussion forms,



an “idea wall,” and/or location-focused questions in which users can use interactive maps to indicate their concerns and suggestions. Unlike a one-time meeting, this type of engagement can occur over a set period of time, giving stakeholders the opportunity to participate as they are available. The Social Pinpoint platform offers flexibility and adaptability to continually update the website and use different tools as needed.

This second workshop will also serve as the CPTF’s public hearing, which is required by NY State Law before the document is sent to the Town Board for consideration. We will work closely with staff, including legal counsel, to ensure that it meets all the relevant statutory standards.

### Task 1.E Public Survey

For this project, we propose to develop a public survey which would be launched after the first public workshop. The survey would be developed using the Social Pinpoint community engagement platform, which provides a graphically engaging, user-friendly toolkit that allows participants to share ideas, express concerns, and respond to recommendations. The purpose of the survey would be to test the previously prepared draft vision and recommendations to see where work still needs to be done. The surveys will be created in such a way that they can solicit feedback as a printed version to be distributed at key municipal locations (i.e. library, Town Hall).

It is understood that the survey, as with any online survey, may not constitute a scientific survey of all Shelter Island residents and business owners.

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However, an online survey that is well organized and enjoys a healthy participation rate can provide a valuable qualitative picture of Town, which can better ensure that the Plan's recommendations are responsive to the needs and priorities of the stakeholders.

### **Task 1.F Topical Area Groups**

As part of the community engagement strategy, BFJ will conduct individual interviews or focus groups designed to solicit input from specific stakeholders identified by the Committee. It is anticipated that these stakeholders will include a select group of leaders from the local community, established committees, and other civic leaders. We will coordinate with the CPTF and CPAC on which stakeholders to target, but envision conducting five (5) focus groups consisting of (1) residents or neighborhood association representatives and the Community Housing Board; (2) Conservation Advisory Committee, Community Preservation Advisory Board, and other environmental groups; (3) area merchants; (4) civic, religious, and non-profit institutions; and (5) students. We believe it is important to reach younger residents, who are typically underrepresented in the planning process. This could potentially be done through partnering with the High School Student Council.

Our experience has shown that it is important to conduct targeted, and separate, outreach to these groups. Each stakeholder group's input is highly valuable, but they may be most likely to engage in candid conversations if among their peer group. The focus group meetings would be conducted via Zoom (or comparable) platform, which will provide for both interactive engagement by participants and the ability for the consultants to share a presentation, maps, and other graphics to further the conversation.

Another effective outreach strategy would be to get formalized input from the Town's established committees. We would ask them to first review the draft Comprehensive Plan Chapters and then provide the following responses:

- Recent Projects/Actions: Provide an overview of significant actions or projects the commission has worked on in the past 10-years (if applicable).
- Issues and Priorities: Overview of issues of concern and priorities for the Comprehensive Plan (over the next 10-years).
- Other Considerations: Other issues or opportunities the Town should consider for the Plan.

### **Task 1.G Town Board Meeting**

The Town Board is the only body that can adopt the Comprehensive Plan, therefore they must be kept informed throughout the process and given opportunities to provide feedback. We anticipate that the CPTF will keep the full Town Board abreast of the plan. If desired, we can meet with the Town Board once during preparation of the plan. We will also meet with the Town Board during the adoption process of the Plan.

#### **Task 1 Deliverables:**

- Community Engagement Plan
- Stakeholder Meeting Summary Report
- Workshop presentations and summary reports
- Public Survey Summary Reports

## **TASK 2 – COMPREHENSIVE PLAN UPDATE (PLAN UPDATE)**

### **Task 2A. Project Initiation and Management-Mobilization**

Close coordination between the BFJ Team, the CPTF, and Town Staff is critical to a successful planning process. It keeps us on track, ensures that our work is aligned with Town priorities, and allows for flexibility to respond to new policy and planning ideas throughout the process. This task includes the following items:

- Kick off meeting with the CPTF: The intent of this initial kick-off meeting is to discuss the proposed scope of work and project schedule, identify key roles and responsibilities, schedule upcoming

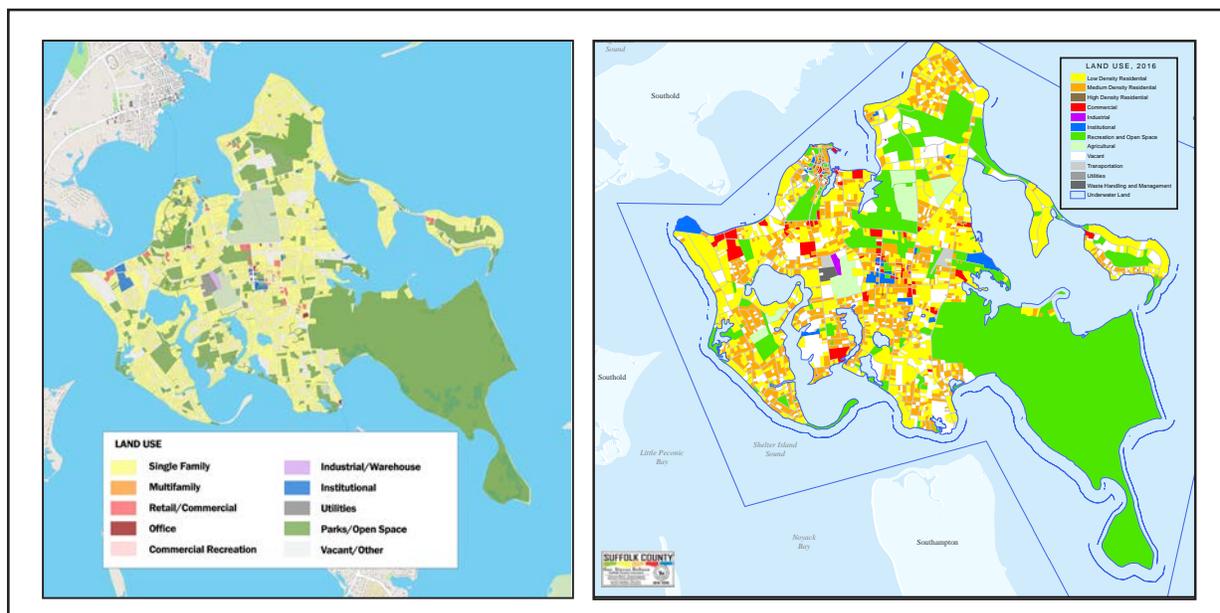
meetings, and conduct a tour of key planning areas. A key topic to be discussed at this kick-off meeting will be the development of a community outreach strategy for engaging the various stakeholders in order to create a consensus-driven vision for the project. We intend to discuss the best engagement approach which considers constraints due to COVID. Our public outreach strategy includes both in-person meetings and online exercises that would be done in tandem to make sure that everyone in the community has an opportunity to participate particularly at key moments in the timeline.

- Web-conference/In-person meetings (monthly or bimonthly): We find that these meetings are important to review deliverables throughout the process. Given the situation surrounding the COVID pandemic, it is likely that these meetings will be scheduled online for the time being. We have the capability to conduct video conference calls with screen sharing to review project deliverables together without having to meet in-person. As the situation changes, we will be available for in-person meetings. We would try to schedule in-person meetings in coordination

with other trips to Shelter Island (e.g., site visits, project meetings, public workshops, etc.).

- Additional calls/meetings as needed: We are always available for frequent communication with Town staff, including via email, phone calls, and in-person meetings.

In this task, the BFJ Team will review the draft Comprehensive Plan Chapters and materials, the 1994 Plan, the 2008 Update, and other relevant policies, plans, and guidelines. We will also review additional completed and ongoing plans undertaken by various Town departments/agencies including Public Works, the Board of Education, Engineering, Highway Department, and Town committees to determine what has occurred in recent years and to determine what projects are still in the planning stages. As part of this effort, BFJ Planning will meet with Town staff to acquire additional background information, such as GIS data, prior applications, feasibility reports, etc. This review will help to establish a planning and policy baseline and identify important development patterns to consider for the Town's future growth.



Land Use Identification  
Source: Left: Core Logic Real Estate Data, Right: Suffolk County

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**Deliverables:**

- Recommended changes to the Project Management Plan including the Schedule and to the CPAC and TWG charters.
- Agendas, presentation materials, minutes, and action item lists needed to support the meetings.

**TASK 2B: 2032 COMPREHENSIVE PLAN - GOALS, IMPLEMENTATION ITEMS**

In this task, the BFJ Team will build on the various inputs received throughout the planning process – draft chapters, public workshops, online surveys, stakeholder meetings, discussions with the CPTF and CPAC, and review of planning studies and data – to develop draft chapters and specific implementation actions that address the issues and goals identified.

We propose to synthesize materials efforts in a document that is easy to read and in a graphic format that illustrates general themes that arose from the community. The document will not be an encyclopedic compilation of existing conditions. Data and analysis will be used to highlight issues and initiatives addressed in the plan.

In this task, we will revise and polish chapters one by one for submission to the CPTF for review. The first draft would be a working draft in Microsoft Word format and the second draft would be a polished version in a more graphic form, with images embedded in InDesign. Once the Indesign draft is completed, BFJ will present the document to the CPTF for final review and edits before it is sent to the Town Board for consideration.

Some of the recommendations are likely to involve land use and zoning. Thus, the draft plan will incorporate will incorporate a Future Land Use Map, supported by the vision, goals, and objectives, which will graphically illustrate the Plan’s recommendations, including potential land use changes that will require zoning map revisions. This section will also discuss consistency with any relevant regional plans.

**Deliverables:**

- Draft Comprehensive Plan Update Chapters

**TASK 2C. ROADMAP TO SUCCESSFUL IMPLEMENTATION**

The Comprehensive Plan will provide policy recommendations to guide future land use and economic development decision-making for a municipality; however, the plan is only the first step in achieving the community’s vision. Following adoption of a comprehensive plan, the Town must implement the recommendations of the plan in order to put them into action. To this effect, it is critical that the Comprehensive Plan Update include a summary of action items that should be undertaken in order to implement the plan’s policies. As part of this component, which will ultimately be the final Plan chapter, we will create an “implementation matrix” that outlines the policies and strategies contained in each of the plan chapters. We will populate this matrix with action items to be executed by the Town; the agency responsible for each respective action item; order of magnitude cost and time estimates; and identification of any potential funding sources toward implementation. We will provide the implementation matrix as an Excel document so that the Town can easily keep track of and report on progress.

**Deliverables:**

- Roadmap (Implementation Matrix)
- Electronic and interaction reporting system (excel document)

**TASK 3: FINAL COMPREHENSIVE PLAN UPDATE AND SEQ**

**Final Plan and Adoption**

After the public hearing, BFJ will make any necessary changes to the plan, as directed by Town Board. We will then produce a Final Comprehensive Plan ready for adoption.

The final plan will be graphic and web-friendly. Links to particular areas of focus on the website can direct users directly to the location in the plan where that

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information is provided. We will create language and graphics for the Town's website to create a page that explains the highlights of the plan and directs the reader to various points in the document.

#### **EAF, SEQR Coordination, and SEQR Determination**

BFJ will assist the Town Board in its declaration of Lead Agency under the State Environmental Quality Review Act (SEQR) and complete Parts 1, 2 and 3 of the full Environmental Assessment Form (EAF), including all accompanying narrative, analysis and mapping. Given the narrowly focused study area, we believe that the EAF can provide detailed analysis of potential impacts on representative sites, which will allow the Village Board to take a "hard look" at the potential zoning amendments. Any future development proposed on specific sites would be subject to a site-specific environmental review. Thus, we do not anticipate that a Generic Environmental Impact Statement (GEIS) would be required. BFJ will prepare the SEQR Determination of Significance (anticipated to be a Negative Declaration). If a Positive Declaration of significance is determined for the project, a GEIS must be prepared, and would require a supplemental contract of services, including an additional budget allocation.

#### **Deliverables:**

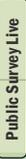
- Environmental Assessment Form, Parts 1 and 2.
- Intent to be Lead Agency Resolution.
- All required SEQR notices.
- Negative Declaration and associated resolutions.
- Final Comprehensive Plan, in hard copy and digital form.

# **SCHEDULE**

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## Shelter Island Comprehensive Plan Proposed Project Schedule

		Month	1	2	3	4	5	6	7	8
<b>Task 1: Community Engagement</b>										
Task 1.A	Community Engagement Plan									
Task 1.B	Town Board Comprehensive Planning Task Force (CPTF)									
Task 1.C	Comprehensive Plan Advisory Committee (CPAC)									
Task 1.E	Community-wide Workshops									
Task 1.F	Public Survey									
Task 1.G	Topical Area Groups									
Task 1.H	Town Board Meeting									
<b>Task 2: Comprehensive Plan Update Draft</b>										
Task 2.A	Project Initiation and Management									
Task 2.B	Goals, Implementation Actions									
Task 2C	Implementation Roadmap									
<b>Task 3: Final Comprehensive Plan Update and Environmental Review (SEQR)</b>										
Task 3.A	Final Plan and Adoption									
Task 3.B	EAF, SEQR Coordination, and SEQR Determination									

Town Board Meetings  
(Lead Agency, Public Hearing, Determination)



# REFERENCES

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## REFERENCES

### **Village of Southampton**

Alex Wallach, AICP, Planning Director  
(631)- 283-0247 Ext: 201  
awallach@southamptonvillage.org

### **Town of North Hempstead**

Michael Levine, AICP, Commissioner  
516.869.6311  
levinem@northhempsteadny.gov

### **Town of Islip**

Ron Meyer, Commissioner  
631.224.5450  
RMEYER@islipny.gov



# **COST PROPOSAL**

# COSTS

Proposed Budget by Phase and Task		Sub-Task Budget	Task Budget
<b>Task 1: Community Engagement</b>			<b>\$31,000</b>
Task 1.A	Community Engagement Plan	\$2,000	
Task 1.B	Town Board Comprehensive Planning Task Force (CPTF) (7)	\$7,000	
Task 1.C	Comprehensive Plan Advisory Committee (CPAC) (3)	\$3,000	
Task 1.E	Community-wide Workshops (2)	\$8,000	
Task 1.F	Public Survey (1)	\$5,000	
Task 1.G	Topical Area Focus Groups (5)	\$4,000	
Task 1.H	Town Board Meeting	\$3,000	
<b>Task 2: Comprehensive Plan Update Draft</b>			<b>\$40,000</b>
Task 2.A	Project Initiation and Management	\$8,000	
Task 2.B	Goals, Implementation Actions	\$24,000	
Task 2C	Implementation Roadmap	\$8,000	
<b>Phase 3: Final Comprehensive Plan Update and Environmental Review (SEQR)</b>			<b>\$17,000</b>
Task 3.A	Final Plan and Adoption	\$10,000	
Task 3.B	EAF, SEQR Coordination, and SEQR Determination	\$8,000	
	<b>Total</b>		<b>\$90,000</b>

**BFJ 2023 PUBLIC BILLING RATES**

<b>PRINCIPALS</b>	<b>RATE PER HOUR</b>
F. Fish	\$280
G. Jacquemart	\$280
S. Yackel	\$255
S. Favate	\$255
<b>ASSOCIATE PRINCIPALS</b>	
N. Levine	\$245
P. Van den Kooy	\$245
T. Madden	\$245
J. Martin	\$245
<b>SENIOR ASSOCIATES</b>	
J. West	\$255
<b>ASSOCIATES</b>	
T. Young	\$170
S. Del Fava	\$170
L. Rennee	\$170
<b>PROFESSIONAL STAFF</b>	
M. Freker	\$150
C. Jimenez	\$150
E. Junker	\$150
<b>INTERN</b>	\$80
<b>WORDPROCESSING/PRODUCTION</b>	
F. Mohamed	\$95
<b>SURVEYORS/TRAFFIC COUNTERS</b>	\$75



# **APPENDIX: BID FORMS**

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**Form A - Bid Form**

Business / Bidder Name: BFJ Planning

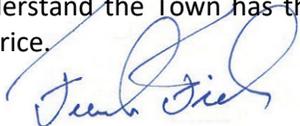
Address: 115 5th Avenue, New York, NY 10003

Contact Person: Frank Fish, FAICP

Phone Number: 212-353- 7476

Bid submitted: \$ 90,000.00

I, Frank Fish have read the Town of Shelter Island solicitation documents, and have complied with the mandatory requirements stated herein. I understand I have an opportunity to ask questions regarding this solicitation, and that such questions have been asked and answered by the Town. I understand the Town will reject incomplete bids. I also understand the Town has the right to select the bid that offers the best value over the lowest price.

Signed:  Date: 2/2/2023

Printed: Frank Fish, FAICP

Accepted by: \_\_\_\_\_ Date: \_\_\_\_\_

**Form B - Non-Collusion Certificate Form**

By signing this bid, each bidder and each person signing on behalf of any bidder certifies, and in the case of a joint bid each party thereto certifies as to its own organization, under penalty of perjury that to the best of their knowledge and belief:

The prices in this bid have been arrived at independently, without collusion, consultation, communication or agreement for the purpose of restricting competition as to any matter relating to such prices with any other bidder or with any other competitor;

Unless otherwise required by law, the prices which have been quoted in this bid have not been knowingly disclosed by the bidder and will not knowingly be disclosed by the bidder prior to the opening directly or indirectly, to any other bidder or to any competitor; and

No attempt has been made or will be made by the bidder to induce any other person, partnership or corporation to submit or not to submit a bid for the purpose of restricting competition.

Signed: 

Title: Frank Fish, FAICP, Principal

Firm: BFJ Planning

Date: 2/2/2023

**Form C - References Form**

References – The Town will enter into an agreement only with a Bidder(s) having a reputation of satisfactory performance. The Bidder’s ability to provide timely service; knowledgeable, conscientious, and courteous staff; reasonable care and skill; invoicing consistent with contract pricing, etc., are important to the Town. Bidder provides information for THREE clients, other than the Town of Shelter Island, that presently contract with Bidder for similar goods or services:

Reference #1 Firm / Name: Town of North Hempstead  
Address: 220 Plandome Road, Manhasset NY 11030  
Contact Person: Michael Levine, AICP, Commissioner  
Phone Number: 516.869.6311  
E-Mail levine@northhempstead.com

Reference #2 Firm / Name: Nassau County  
Address: 1194 Prospect Avenue Westbury, NY 11590  
Contact Person: Sean Sallie, AICP, Deputy Commissioner  
Phone Number: 516.571.9342  
E-Mail: ssallie@nassaucountyny.gov

Reference #3 Firm / Name: Town of Islip  
Address: 655 Main Street, Town Hall Islip, NY 11751  
Contact Person: Ron Meyer, Commissioner  
Phone Number: 631.224.5450  
E-Mail RMeyer@islipny.gov

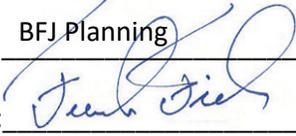
Please Note: The bid evaluators may contact the customer references, as well as any other customers or customer employees. A Bidder with unsatisfactory references may have its bid rejected.

**Form D - Insurance Form**

I, Frank Fish, FAICP, am the Contractor or Subcontractor for the project and have included valid insurance documents required for this project. I also agree to maintain coverage for the duration of this project. Insurance limits which do not meet the amount requirements at the time of bid will be satisfied prior to any work being commenced. The Town will also be named as additional insured on the general liability coverage policy.

- Vehicle Insurance
- Workers Compensation
- General Liability
- Disability Insurance

Bidder: BFJ Planning

Signed:  Date: 2/2/2023

Printed: Frank Fish, FAICP

**Form E - Subcontractors Form** Not applicable at this time

Subcontractors – Bidder submits as Attachment 1 to this Bid Form E a list of all subcontractors it will use in performing the requirements of the agreement resulting from this solicitation. A subcontractor is any separate legal entity used to perform requirements of the proposed agreement. The list shall include the firm’s name, contact person and title, mailing address, telephone number, fax number and a description of the service(s) to be subcontracted. Bidder shall also attach a copy of the letter from the subcontractor stating its commitment to perform the services(s) subcontracted.

Firm Name:  
 Contact Person:  
 Title:  
 Mailing Address:  
 Telephone Number:  
 Fax Number:  
 Description of Services Rendered:

Firm Name:  
 Contact Person:  
 Title:  
 Mailing Address:  
 Telephone Number:  
 Fax Number:  
 Description of Services Rendered:

Firm Name:  
 Contact Person:  
 Title:  
 Mailing Address:  
 Telephone Number:

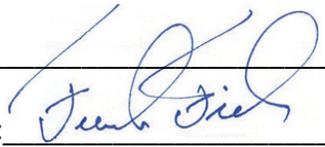
Fax Number:  
Description of Services Rendered:

**Form F Project Process / Technique**

Any contractor responding to this RFP must provide details of the process / techniques you plan to use on this project.

Details as Follows: Please see proposal Section: Methodology and Approach

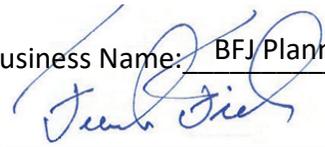
Materials List: n/a

Signed:  Date: 2/2/2023

**GROUNDS FOR CANCELLATION OF LEASE/CONTRACT BY MUNICIPAL CORPORATIONS**

Upon the refusal of a person, when called before a grand jury to testify concerning any transaction or Lease/Contract had with the State, and political subdivision thereof, a public authority or with any public department, agency or official of the State or of any political subdivision thereof or of a public authority, to sign a waiver of immunity against subsequent criminal prosecution or to answer any relevant question concerning such transaction or Lease/Contract, a) such person, and any firm, partnership or corporation, of which he is a member, partner, director or officer shall be disqualified from thereafter selling to or submitting bids to or receiving awards from or entering into any Lease/Contracts with any municipal corporation or any public department, agency or official thereof for goods, work, or services, for a period of five years after such refusal, and to provide also that, b) any and all Lease/Contracts made with any municipal corporation or any public department, agency or official thereof, since the effective date of this law, by such person, and by any firm, partnership or corporation of which he is a member, partner, director or officer may be cancelled or terminated by the municipal corporation without incurring any penalty or damages on account of such cancellation or termination, but any monies owing by the municipal corporation for goods delivered or work done prior to the cancellation or termination shall be paid. This condition shall be further subjected to any other provisions or subsequent amendments to Section 103-a and 103-b of the General Municipal Law. In acknowledgment of the above:

Offeror's Business Name: BFJ Planning

Signed by: 

Title: Frank Fish, FAICP, Principal

Date: 2/2/2023