

SCHEDULE A **SCOPE OF SERVICES**

I. PROJECT UNDERSTANDING

- A. The COUNTY is engaged is creating a Greenway Compact for the COUNTY. This project will synthesize several existing elements of the COUNTY'S Comprehensive Plan element into a document that aligns with the Greenway principles and create a blueprint for a Greenway Compact ("the Compact"). The existing plans are the Long Range Transportation Plan, Ulster Tomorrow (Sustainable Economic Development Plan), Priority Strategies to Support Housing Development in Ulster County, and the Ulster County Open Space Plan. Once complete, the Compact document will form the unifying element of Ulster COUNTY'S Comprehensive Plan and adoption as such will be sought.
- B. In addition to the Compact document itself; the Compact includes the creation of an **Ulster County Design Manual**.

II. PROJECT MANAGEMENT

- A. The COUNTY'S Project Coordinator (PC) will be the Ulster COUNTY Planning Department's Director or his designee. The PC shall approve project deliverables and their distribution to the Technical Advisory Committee (TAC), approve scheduling of project events, grant initial approval of all invoices, handle any media inquiries, and perform general project administration work. The PC shall also be responsible for acceptance of project deliverables which shall be made in writing to the CONSULTANT after consultation with the TAC.
- B. **Project Management Meetings**
Project management meetings shall include at least six (6) in-person meetings and/or telephone conference call meetings with the CONSULTANT, TAC, and COUNTY staff scheduled at regular intervals throughout the project. Interim meetings may be scheduled as requested by the COUNTY or CONSULTANT. The CONSULTANT shall prepare meeting notes, agendas, highlight study progress and present updates to the PC. The CONSULTANT shall submit meeting notes to the PC within ten (10) days of each meeting
- C. **Conference Calls and Project Update Memos**
The CONSULTANT shall set up a conference telephone call with the COUNTY once every two (2) weeks to discuss the project activities, report on the process of the Compact, and plan future activities. The CONSULTANT shall also submit to the PC a one (1) page status report highlighting work accomplished every (30) days until the submittal of the final report. The written status report shall accompany the monthly invoice unless otherwise requested by the PC.

III. TECHNICAL ADVISORY COMMITTEE (TAC)

The COUNTY shall assemble a TAC. The TAC shall be comprised of members from the Ulster County Planning Board, Ulster County Planning Department staff, and other individuals chosen at the discretion of the PC. The TAC shall provide guidance throughout the project and help reach a consensus on project recommendations for inclusion in the final draft compact.

IV. TASKS

The SERVICES shall be in accordance with the task descriptions below:

A. SUMMARY OF TASKS

- Task 1: Reconnaissance and assessment of four (4) principal Ulster County Plans
- Task 2: Illustrate Conformance of Existing Municipal Plans
- Task 3: Draft Compact Document
- Task 4: Supplemental Documents
- Task 5: Final Compact Document
- Task 6: Outreach to Communities, Public Process, and Revisions

B. TASK DETAILS

1. TASK 1: RECONNAISSANCE, AND ASSESSMENT OF ULSTER COUNTY'S EXISTING COMPREHENSIVE PLAN ELEMENTS

- a. This task will provide an integration of the COUNTY'S existing comprehensive plan elements with the five (5) Greenway principles identifying key areas in each of the plans and bringing them into a Technical memo that will later be utilized as part of the Draft Compact. The memo will clearly show the alignment of the comprehensive plan elements with the five (5) Greenway principles, which are as follows:
 1. Natural and Cultural Resource Protection
 2. Economic Development
 3. Public Access
 4. Regional Planning
 5. Heritage and Environmental Education
- b. The CONSULTANT will review the four (4) existing COUNTY-wide plans: the Long Range Transportation Plan, Ulster Tomorrow (Sustainable Economic Development Plan), Priority Strategies to Support Housing Development in Ulster County, and the Ulster County Open Space Plan, so as to:
 1. Identify those aspects of each of the four plans that relate to the five (5) Greenway Principles.
 2. Organize and relate the content of the four (4) plans according to the topic areas in accordance with the Draft Outline for the Compact – Priority growth and conservation, Housing and neighborhood preservation, Natural resources, Transportation, Community fabric and Economic development, and the five (5) Greenway principles.
- c. This identification will be in the form of bringing forward key areas of each of the plans to highlight their relationship to the five (5) Greenway principles. These will form the basis for the draft texts required in Task 3A below
- d. ***Task 1 Deliverables: Technical Memo 1: the CONSULTANT will produce a technical memo summarizes key areas for each of the plans reviewed and integrates these summaries into an expanded outline for the Compact that clearly shows the relationship of these plan elements to the five (5) Greenway Principles. The draft memo shall be reviewed by the TAC and any comments shall be incorporated into the final product.***

2. TASK 2: ILLUSTRATE CONFORMANCE OF EXISTING MUNICIPAL PLANS WITH THE FIVE GREENWAY PRINCIPLES.

- a. This task will illustrate how the existing Comprehensive Plans of municipalities in Ulster County conform to the five Greenway principles.
- b. The CONSULTANT working with the Ulster County Planning Department's recently completed audit of the local comprehensive plans, will identify the ways in which those plans either conform or do not conform to the Greenway principles and the key areas of the COUNTY'S plans reviewed and highlighted in Task 1. The CONSULTANT will develop an appropriate graphic to illustrate this and incorporate key quotes from the plans into an overview of Compact conformity that will be utilized in the Compact and the presentations and exhibits used as part of the outreach strategies described below.
- c. ***Task 2 Deliverables: The CONSULTANT shall produce a graphical representation of local plan conformance to the Greenway Principles and a memo that highlights the representative sections of the plans that best illustrate Greenway conformity for review by the TAC. The CONSULTANT shall respond to comments and suggestions by the PC or TAC.***

3. TASK 3: DRAFT COMPACT DOCUMENT

- a. This task will create both the mapping and graphics that will be the basis of presentations that will be become part of the Compact document and the Draft Compact Document itself. The Draft Compact shall generally, follow the outline included below and provide a clear overview of each section's topic/purpose followed by defining strategies and illustrative examples of their use in local/COUNTY plans.
- b. The CONSULTANT shall ensure that a graphic identity for Draft Compact is developed so that it is clear and accessible to a broad audience that includes the general public, planners, elected officials, developers and others policy makers. The CONSULTANT will present three (3) alternatives for layouts of representative pages for approval by the PC and TAC. Using the outline, the preferred layout and graphic identity. The CONSULTANT shall develop a Draft Compact Document for review by the PC and the TAC.
- c. Task 3A Mapping and Graphics
The CONSULTANT, working with the COUNTY, will create mapping and other graphic materials needed to create a clear, graphically consistent, attractive and accessible Compact document and needed presentations. The types of maps and graphics to be included shall be drawn from the outline for the Draft Compact Document that is included below. The final maps and graphics necessary and their scope will be developed in conjunction with the PC and the TAC;
- d. TASK 3B Draft Compact Document
The CONSULTANT will create a draft Compact Document that utilizes the outline below. Specific map and graphic elements shall be included as outlined below:

Task 3 - The Draft Compact Outline

1. Defining the Compact:
 - 1.1. Highlight the key elements of the Compact, define its role in local and COUNTY land use decisions, describe the process for becoming a compact and illustrates how local plans and statues conform to the principles in the Compact document. Graphics and maps shall include Greenway communities, key quote(s) from local plans, maps and graphics showing how municipalities are currently conforming.
2. Greenway Compact Principles for Ulster County:
 - 2.1. Discussion of each of the five (5) Greenway Principles as they relate to the COUNTY'S adopted comprehensive plan elements and other policies of the COUNTY. These shall be further defined using graphics and mapping specific to the COUNTY. Mapping will consist of five (5) "signature" maps and composite graphics.
3. Putting the Pieces Together: Strategies for a Greenway Compact

This portion shall highlight the major principles involved in the COUNTY'S Compact. Each element shall be presented as an overview with associated text and graphics and sub-categories necessary to further emphasize the important points and provide the strategies associated with that section:

 - 3.1. Priority Growth and Conservation Areas: identifies smart growth principles as incorporated in the Compact, the methodology behind the mapping and summarize the findings. Mapping will include composite map of growth and conservation areas with graphics - such as from the design manual (see Task 4 below) to illustrate the strategies included.
 - 3.2. Housing and Neighborhood Preservation: identifies housing as a key element in community quality of life and success including economic development, need for acceptance of appropriate housing types and affordability levels. Includes elements of historic preservation, and sets a

discussion of community character. Includes maps and graphics on affordability, geographic distribution, defining density, etc.

- 3.3. Natural Land Resources: identifies agriculture and water resources as major elements in the landscape and speaks to biodiversity achieved within large areas of contiguous forest areas. Includes maps and graphics that show protected lands, active farm areas, large blocks of forested lands and their relationship to the community centers.
- 3.4. Transportation System: identifies regional linkages and major in-COUNTY corridors, discusses alternate transportation modes including mass transit and bike/pedestrian, and speaks to policies associated with preservation of the transportation system, including its capacity, and rethinking mobility. Maps and graphics to illustrate major corridors, trail connections, access management, journey to work and common system management techniques, etc.
- 3.5. Community Fabric: examines the major elements of the community and their interaction that act as important building blocks for sustainable communities, including main streets, schools, parks/trails, government buildings, historic areas, and the supporting infrastructure. Articulates the benefits of mixed uses and compact development vs. sprawl. Speaks to defining place edges and gateways. Maps and graphics that define uses and densities associated with community centers (transects), historic and cultural resources and provisions for infrastructure (water/sewer), and establishment of gateways.
- 3.6. Economic Development Strategies: provides a discussion on the critical role for main streets, waterfronts, and tourism as part of the geography of economic development. Articulates the need for planning and zoning response (streamline approvals), and identification of redevelopment sites as part of the planning response for economic development. Establishes the need for workforce, education, and investments as part of an overall economic development program.

e. Throughout Task 3 the CONSULTANT will generate text and mapping drafts for the PC and TAC to review before creating the Draft Compact.

f. ***Task 3 Deliverables: The CONSULTANT shall produce the Draft Greenway Compact.***

4. TASK 4: DESIGN MANUAL:

- a. This task shall utilize the CONSULTANT'S Design Manual to create an accessible and useful document that can be utilized in conjunction with the Compact by individual municipalities.
- b. The CONSULTANT shall create a graphic document that illustrates exactly where and how the Place Types and Details in the CONSULTANT Design Manual can be shown to pertain to the places in the larger COUNTY landscape. The CONSULTANT will work with the COUNTY'S Planning Department to find an acceptable approach using strategies that may include, but not be limited to: key plans and aerial photos that illustrate how prototypical COUNTY places correspond to Place Types in the Design Manual; photographs of specific COUNTY places and landscapes that can be keyed to the Design Manual so that COUNTY users recognize the case studies and place-types; and a revised and extended narrative for the "Place Type Diagnostics" that guide Ulster COUNTY users to the most relevant parts of the manual.
- c. The CONSULTANT also understands it may be necessary to add additional Place-types and Case Studies in Section 1; additional Design Details in Section 2; and implementation strategies in Section 3 of the CONSULTANT Design Manual as part of this Task.

- d. **Task 4 Deliverables:** *The CONSULTANT shall produce the Ulster County Design Manual including examples or case studies relating how the Design Manual can be applied to locations in Ulster County.*

5. TASK 5: FINAL DRAFT GREENWAY COMPACT

- a. The CONSULTANT will incorporate the comments and policy decisions received from the TAC and the PC on the Draft Greenway Compact, in to a Final Draft Greenway Compact. This document will be formatted so that it easily released on-line. In addition, the CONSULTANT shall produce a Final Draft Greenway Compact presentation that provides an overview of the process of becoming a compact community, the Final Draft Greenway Compact and a summary of the plans and policies considered in its development.
- b. **Task 5 Deliverables:** *The CONSULTANT shall produce the Final Draft Greenway Compact Document and presentation, and a Final Ulster County Design Manual.*

6. TASK 6: OUTREACH TO COMMUNITIES, PUBLIC PROCESS, AND REVISIONS

- a. To help build a consensus as to what a regional, COUNTY-wide Compact needs to be, the Ulster County Planning Department intends to conduct significant outreach that includes COUNTY and local officials, key constituents, and the general public. A combination of communication techniques will be used to share information and provide various options for participation by a range of constituents.
- b. The COUNTY will lead the outreach effort, will prepare public notices and lead the SEQRA process as required. The CONSULTANT will support this effort in the following ways:
 - 1. Assist the COUNTY'S Planning Department in developing a presentation and supporting exhibits (PowerPoint, poster boards).
 - 2. Assist the COUNTY'S Planning Department in creating content for any social media or web-based information.
 - 3. Present /help facilitate at two multi-municipal meetings. The format may be a focus event, a sub-regional charette-style workshop, or some other format to be determined by the COUNTY.
 - 4. Revise the Final Draft Green Compact prior to its submittal to the Greenway Council and COUNTY Legislature to reflect comments and concerns as requested by the PC.
 - 5. Assist in the presentation of the Final Draft Greenway Compact to the Greenway Council and the COUNTY Legislature.

V. General Note on Deliverables

In addition to the deliverables included above, all digital material developed by the CONSULTANT as part of the Compact will be made available to the COUNTY in its native format and in Adobe PDF during the course of the project. The CONSULTANT will also provide one (1) CD/DVD at the completion of the project containing all of the project documents including presentations in both their native format and in Adobe pdf to be indexed as approved by the COUNTY'S PC. All GIS materials shall be in ArcMap.