



# Hudson River Valley Greenway



Maurice D. Hinchey  
Hudson River Valley  
National Heritage Area

**KEVIN M. BURKE**  
Chair  
Greenway Conservancy

**MEG DOWNEY**  
Chair  
Greenway Council

**ANDY KITZMANN**  
Executive Director

## Hudson River Valley Greenway

Strategic Planning RFP

Questions and Answers

December 30<sup>th</sup>, 2024

**PLEASE NOTE: The submission deadline has been extended to *Friday, January 17<sup>th</sup>, at 5:00 PM.***

**Question:** What is the budget/Not to exceed?

*Answer: A budget is not currently determined. Selection of consultant will be made based on most advantageous proposal of services vs. proposed fees.*

**Question:** Is there an M/W/BE goal for this project?

*Answer: Although there is no minimum MWBE requirement for this RFP, HRVG strives to achieve a 30% MWBE participation rate.*

**Question:** Is this a small business set aside or is it open to large businesses as well?

*Answer: Any qualified business or individuals are encouraged to submit.*

**Question:** To be eligible to bid on the RFP, does the consulting firm have to be registered and approved to do business with the NYS Government?

*Answer: No. The contract will be with the Greenway Conservancy for the Hudson River Valley, Inc., a public benefit corporation.*

**Question:** Would you consider extending the deadline to 1/24 to provide vendors more time to respond after question responses are issued?

*Answer: Yes. We will extend the deadline to Friday, January 17<sup>th</sup>, at 5:00 PM.*

**Question:** The submission deadline is unclear - are all proposals due on January 10<sup>th</sup> and by what time?

*Answer: Proposals should be submitted by 5:00 PM, Friday, January 17<sup>th</sup> (this is a one-week extension from what was posted in the RFP).*



# Hudson River Valley Greenway



Maurice D. Hinchey  
Hudson River Valley  
National Heritage Area

**Question:** How are proposals to be submitted?

*Answer: Proposals should be emailed to [beth.campochiaro@hudsongreenway.ny.gov](mailto:beth.campochiaro@hudsongreenway.ny.gov)*

**Question:** Will proposals be accepted electronically via email submission?

*Answer: Yes.*

**Question:** Do you have an anticipated date for selection and contract execution that could be reflected in our proposed schedule?

*Answer: The target start date is to introduce the selected consultant at the March 12, 2025 board meeting held at Orange County Community College in Newberg.*

**Question:** Please clarify if the project is an organizational strategic plan or a management plan update for the National Heritage Area.

*Answer: An organizational strategic plan. However, one goal is to elevate the footprint of the National Heritage Area within the larger organization.*

**Question:** The RPF scope includes up to six committee meetings. Will there be a committee overseeing the work on this project?

*Currently, the Executive Committee is serving as the strategic planning committee with the executive director and two staff members serving as primary points of contact. We expect this structure will evolve in collaboration with the successful consultant.*

**Question:** Would HRVG entertain additional outreach beyond the 5-6 interviews with municipal and county officials?

*Answer: Yes.*

**Question:** Would HRVG entertain a mix of stakeholder meetings and individual interviews?

*Yes, this would be our preference.*

**Question:** Do you have a steering committee selected or a sense of how large this group will be and who may be asked to be on it?

*Answer: Currently, the Executive Committee is serving as the strategic planning committee with the executive director and two staff members serving as primary points of contact. We expect this structure will evolve in collaboration with the successful consultant.*

**Question:** Is there a strategic planning committee in place? If not, is there an appetite for one and some sense of who would serve?



*Answer: Currently, the Executive Committee is serving as the strategic planning committee with the executive director and two staff members serving as primary points of contact. We expect this structure will evolve in collaboration with the successful consultant.*

**Question:** Can you provide more detail on Objective #2 "explore organizational leadership"? Are you hoping the plan will explore or define changes in the overarching "org chart" or leadership structures?

*This refers to the HRVG's committee structure. We wish to expand our committee structure in a manageable way and more fully involve members of the boards of directors on committees. Currently, we have an Executive Committee, Finance Committee, and Grants Committee.*

**Question:** Objective #5 states "expand staff capacity". Are you hoping the plan will specifically define new and/or revised staff roles?

*Yes.*

**Question:** Related to both the above, are you expecting the consultant to provide financial analyses to support the above?

*No. However, the strategic planning process should consider the broad financial impact of staff and programmatic expansion and make recommendations for how to address capacity building in a sustainable way.*

**Question:** What timeframe does HRVG expect this strategic plan to cover (5, 10, or 15+ years)?

*Answer: We are currently open to considering a range of timeframes and scenarios.*

**Question:** Ideally, when would HRVG like to see this strategic planning project completed?

*Answer: The goal is to have the plan approved at the December 2025 board of directors meeting.*

**Question:** What is the proposed timeline for the planning process? When will selections be made and are there target start or completion dates, or other major milestones that will impact the planning timeline?

*Answer: We anticipate working closely with the successful candidate to define a workable schedule inclusive of interviews, writing & editing, meetings and review sessions. In very broad terms our ideal schedule is as follows:*

- *March 2025 – Introduce consultant at board meeting.*
- *June 2025 - dedicate a portion of the Board Meeting to Strategic Planning.*
- *Late summer/early fall 2025 full day retreat (overnight option for those traveling)*
- *October/December Board meeting – introduce draft strategic plan*
- *December/March 2026 board meeting – vote on final plan*



**Question:** What does it mean that proposals will be given priority consideration? Is that an indication of a quick decision-process, or will proposals be evaluated on a rolling basis as they come in? Do you plan to conduct interviews with a short list of responders?

*Answer: Following the submission deadline (which has been extended to Friday, January 17<sup>th</sup>, 2025) HRVG will review all submissions and determine which applicants to interview.*

**Question:** Who will the committee (as described in the “Committee meetings” portion of the scope) be comprised of? Has this committee already been formed?

*Answer: Currently, the Executive Committee is serving as the strategic planning committee with the executive director and two staff members serving as primary points of contact. We expect this structure will evolve in collaboration with the successful consultant.*

**Question:** Does the Greenway have a desired/targeted date for the retreat to occur as well as a location that will be provided/reserved by the Greenway? Will it be hosted at the regional headquarters like in the last strategic planning engagement (Bellefield at Historic Hyde Park)?

*Answer: The location has not been determined. However, we anticipate holding the meeting in late summer or early fall in the mid-Hudson Valley and offer overnight accommodations to all participants.*

**Question:** Does the Greenway have a preference of whether interviews are performed in person or virtually?

*Answer: We do not have a preference.*

**Question:** Will Greenway provide contact information and help organize the stakeholder interviews?

*Answer: HRVG will provide contact information, introductions, and make arrangements for interviews. Virtual interviews will be conducted via Zoom.*

**Question:** Will the requested services be facilitated virtually, in person and/or a hybrid of both?

*Answer: We expect the consultant to attend in person the June Board of Directors Meeting, the Retreat, and the final board meeting when the final strategic plan is presented. Other meetings and interviews may be conducted virtually.*

**Question:** Does Greenway want a definitive proposal for a “creative approach to a final product” at this proposal stage, or is this something that can be developed over the course of the planning process?

*Answer: HRVG encourages proposals that define the creativity of the applicant.*

**Question:** Are you looking for a local consultant, or would a local consultant be advantaged?

*Answer: HRVG does not have a predetermined opinion on the location of the successful consultant. A working knowledge of the Hudson River Valley is preferred.*



**Question:** Are the six committee meetings specific to the strategic planning process (beyond your normal operating procedures), and are they virtual or in person?

*Answer: Yes, these would be specific to the strategic planning process. They will be virtual unless an in-person meeting is determined necessary by the committee and consultant.*

**Question:** One of the objectives is to define Hudson River Valley Greenway -- as much a brand/communication objective as it is a strategic planning objective. As part of strategic planning are you considering changing your name, mission statement, or visual identity?

*Answer: No. We wish to raise public awareness for the HRVG and more fully integrate the Maurice D. Hinchey Hudson River Valley National Heritage Area into our program.*

**Question:** Another objective is to expand staff capacity. Can you further explain that objective, given the funding opportunities or limitations?

*Answer: In the mid-2000's, state-supported staff positions were eliminated and not replaced. Currently the HRVG has four full-time and three part-time positions. Opportunities to build capacity may be found within the National Heritage Area support and unrestricted support. Two full-time positions are currently requested through the state. These are: Finance Manager and Outreach and Communications Manager. HRVG has also recently hired an external accounting firm to manage our financial matters.*

**Question:** For the Outreach and Communication objective, are you looking for a strategy for messaging about the new strategic plan, or are you looking for overall communication strategy for the organization?

*Answer: Overall communication strategy for the organization. A request for a full-time outreach and communication manager is currently pending with NYS. We will know if the position is approved when the state budget is released after April 2025.*

**Question:** Would you welcome a team approach with one main point of contact, or prefer an individual consultant?

*Answer: HRVG does not have a preference.*

**Question:** The objectives for the new strategic plan are clear, but the first paragraph does also include the development of a strategic vision. Would this project be inclusive of a new vision/mission for the Hudson River Valley Greenway as a single, front-facing organization? Or is this project meant to only focus on a new strategic plan using the existing vision/mission?

*Answer: At present, we expect to keep our current vision/mission. However, we are open to exploring these based on new information from interviews and the board retreat.*



**Question:** Given the make-up of the Greenway, comprising three entities with two boards, who would the consultant report to? Is it the new ED? Board chair?

*Answer: HRVG's Trails and Community Outreach Director will serve as the project manager and daily point of contact with the consultant. The Executive Director will serve as the point of contact for the consultant and liaison with the boards of directors.*

**Question:** Is there an ideal timeline for the deliverables? Or are there any compelling event(s) that the Greenway is anticipating this project's final deliverables will enable or support?

*Answer: 2026 is the 250<sup>th</sup> Anniversary of the United States and we expect to take a leadership role within the Hudson Valley in the celebrations.*

**Question:** Is there an existing board or committee that will be involved in the development of the strategic plan, or would the Consultant be responsible to form the committee?

*Answer: Currently, the Executive Committee is serving as the strategic planning committee with the executive director and two staff members serving as primary points of contact. We expect to evolve this structure in collaboration with the successful consultant.*

**Question:** Is it the intention to have the governing boards adopt the final version of the strategic plan?

*Answer: Yes.*

**Question:** In addition to the new executive director who was hired recently, are there any other internal or external circumstances driving the strategic planning process at this time?

*Answer: The HRVG is at an organizational inflection point. The executive director is the first new hire in seven years and the first externally hired executive direction in more than 25 years. In addition, the finance manager served in that role for 39 years. He has retired but remains with the organization in a part-time role to help facilitate the transition of the accounting. Finally, the board's founding chair, who served in the role for more than 39 years, fully retired two years ago.*

**Question:** Is there an existing strategic plan that you are building off of?

1. If yes, what about the current plan or planning process that went well/didn't go well? Are you expecting any of these priorities to continue forward?

*Answer: Trail development went well. We did not engage in defined development activities which remain a priority.*

2. If no, what sorts of assumptions do you have about what the priorities might be?

*Answer: We have become hyper focused on trail development activities and have reduced emphasis on many other organizational mandates.*



**Question:** What kind of existing relationships do you have with the external stakeholder you mentioned in the RFP? Do you anticipate any difficulty gaining access to the key stakeholder groups identified for inclusion in the interview process?

*Answer: We have strong relationships with our stakeholders and all are aware that we are initiating a strategic planning process.*

**Question:** What sort of outcomes are you hoping this plan will result in for the organization, and what kind of impact are you hoping this will drive for your community?

*Answer: First and foremost, to raise awareness for the current programs and opportunities we offer with municipalities and not for profits in the Hudson River Valley. We wish to expand our grant giving programs including both number of applications received and broadening eligible activities. Expand participation in the Community Compact program. Offer our own programming such as trail rides, paddle events, and technical assistance support to communities. Diversify and increase our non-government income sources. Define a strategic approach to HRVG management of the Albany Hudson Electric Trail (we manage a 36 mile section of bike/hike trail between the cities of Rensselaer and Hudson).*

What sort of existing research do you have about....

1. Client/member satisfaction and needs
2. Community needs
3. Peer landscape
4. External trends impacting the space

*Answer: HRVG has little information on any of the above items outside of anecdotal assessments.*

**Question:** What is the decision-making structure and process for approvals on:

1. Research targets and parameters – *Answer: We do not anticipate a formal, university style research approach. HRVG will work with the consultant to identify and prioritize targeted areas for research.*
2. Stakeholder engagement – *Answer - HRVG will provide a broad list of stakeholders with whom we have close relationships, as well as organizations where we would like to develop or expand our relationships. HRVG will work with the consultant to prioritize this list based on the contractual scope of work.*
3. Plan or plan component approval – *Answer: The Executive Director, working in close collaboration with the Trails and Community Outreach Director and the Executive or Strategic Planning Committee (TBD), will provide ongoing approvals for various stages. The two boards of directors will jointly approve the final strategic planning document. The Executive Director will serve as the point of contact for the Boards of Directors.*



**Question:** Are there any milestone dates or key deadlines that we need to plan around?  
(e.g. board meetings, times when the group is coming together, etc.)

*Answer: We anticipate working closely with the successful candidate to define a workable schedule inclusive of interviews, writing & editing, meetings and review sessions. In very broad terms our ideal schedule is as follows:*

- *March 2025 – Introduce consultant at board meeting.*
- *June 2025 - dedicate a portion of the Board Meeting to Strategic Planning.*
- *Late summer/early fall 2025 full day retreat (overnight option for those traveling)*
- *October/December Board meeting – introduce draft strategic plan*
- *December/March 2026 board meeting – vote on final plan*

**Question:** What qualities or experiences are most important to you in a consulting team?

*Answer: Strong institutional planning experience with mission driven organizations and a working understanding of the challenges and opportunities available throughout the Hudson River Valley. Experience leading complex governing bodies bound to state and federal legislation. Ability to lead meetings and present conflicting points of view in constructive ways.*

**Question:** When in 2025 you are hoping to start work?

*Answer: March 2025*

**Question:** What is your current approach to coordination among the three HRVG entities?

*Answer: Both boards meet jointly four times a year. The Executive Committee is comprised of both chairs, and representatives from both boards. The two boards co-lead the National Heritage Area with the Conservancy taking the lead role. There is a clearly positive and collaborative approach to the HRVG governance structure.*

**Question:** Do you have a decision-making process in place to support the development of a strategic plan?

*Yes. The plan will also be refined in consultation with the successful applicant.*

**Question:** How are priorities aligned and coordinated between the three entities?

*Answer: Both boards meet jointly four times a year. The Executive Committee is comprised of both chairs, and representatives from both boards. The two boards co-lead the National Heritage Area with the Conservancy taking the lead role. There is a clearly positive and collaborative approach to the HRVG governance structure.*





**Question:** Does HRVG envision both boards and all staff participating in the retreat (noting that this is quite a few people)? Assuming that the retreat is in person, will expenses for this be covered outside of the consultant's fee or do we need to include these?

*Answer: Yes. We wish to make the process as broadly available as practicable within the organization. HRVG anticipates the retreat to be inclusive of the entire organization. A combination of full group and breakout sessions is envisioned (with staff support provided for various breakouts). HRVG will cover hotel expenses and mileage for the consultant outside of the contract. Other travel expenses for meetings and interviews should be included in the proposal. If airline flights are required for the retreat (and other meetings/interviews), consultants will be responsible for making those arrangements and must include the expense in the proposal.*

**Question:** Is HRVG open to exploring additional approaches for gathering community input as part of this process?

*Answer: Yes.*

**Question:** Noting that the last strategic plan was adopted 10 years ago, we are curious about the horizon HRVG is hoping that the new plan will address.

*Answer: First and foremost, raise awareness of the current programs and opportunities we offer with municipalities and not for profits. Greater participation in our grant giving programs. Expansion and updating of our compact community programs. Expand our offerings for our own programming such as trail rides, paddle events, and technical assistance support to communities.*

**Question:** Is Hudson River Valley Greenway interested in receiving proposals that include actions or initiatives beyond the scope of work as it is written in the RFP?

*Answer: Proposals will be evaluated based on the RFP. Additional actions or initiatives should be included as an add-alternate and will not be considered as part of the overall review process.*

**Question:** Is there an expected duration for this contract?

*Answer: The contract will be one year, or through the submission of the final, board approved, document, whichever comes first.*

**Question:** Does the Hudson River Valley Greenway have any internal employee work or resource group(s)?

*Answer: In addition to the board of directors and three committees, one Advisory Committee exists that is specific to the National Heritage Area. This committee will not play a significant role in the strategic planning process.*



## Hudson River Valley Greenway



Maurice D. Hinchey  
Hudson River Valley  
National Heritage Area

**Question:** Does the Hudson River Valley Greenway have an ideal budget range for this contract?

*Answer: A budget is not currently determined. Selection of consultant will be made based on most advantageous proposal of services vs. proposed fees.*

**Question:** What was the initial impetus for this RFP? Is this in response to a specific event or funding source or is this a proactive part of a broader strategic planning effort?

*Answer: The HRVG is at an organizational inflection point. The executive director is the first new hire in seven years and the first externally hired executive direction in more than 25 years. In addition, the finance manager served in that role for 39 years. He has retired but remains with the organization in a part-time role to help facilitate the transition of the accounting. Finally, the board's founding chair, who served in the role for more than 39 years, fully retired two years ago.*

**Question:** The RFP mentions an all day retreat for Board/Staff, does this mean that the retreat will include the entities together or will there be an all day for the Board and a separate all day retreat for staff?

*Answer: The staff and board will participate in the retreat together.*

**Question:** Is there a preference for in-state consultants?

*Answer: No. However, the successful candidate will demonstrate a working knowledge of the strengths and challenges of the Hudson River Valley and be familiar with similar types of organizations as the HRVG.*