



New York Wine & Grape Foundation

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Request for Proposals

Update to VineBalance Sustainable Winegrowing Certification Scheme

June 8, 2021

1. Background Information:

The New York Wine & Grape Foundation (NYWGF) was created by the State of New York in 1985 as a private, non-profit organization. The enabling legislation established a financing mechanism for promotion and research, providing the industry with both short-term assistance and the potential for long-term viability. NYWGF's programs are developed by a 21-member Board of Directors in consultation with other representatives from industry and state government. The activities carried out by NYWGF are designed to support all uses of New York-grown grapes from all regions of the state. The mission of the NYWGF (updated in February 2018) is to "promote the world-class image of New York grapes and wines from our diverse regions to responsibly benefit farmers, producers and consumers through innovative marketing, research, communication, and advocacy." The vision of the NYWGF (updated in February 2018) is "to be the world's premier region for cool and cold climate viticulture."

New York's grape growers face several challenges to premium wine and grape production, including cool temperatures, heavy rains and high humidity. These factors increase the cost and complexity of vineyard management. New York's Finger Lakes face environmental degradation from land-use management practices that pollute adjacent and downstream waterways. Sustainable vineyard practices are widely regarded as essential to reduce environmental impact and improve the quality of wine in the Finger Lakes region and beyond.

In 2007, a statewide working group completed development of *VineBalance: New York Guide to Sustainable Viticulture Practices*. This workbook established the initial guidance criteria for producers to self-assess the sustainability of vineyard operations. However, the standards are over a decade old and in need of updating.

2. Statement of Request:

NYWGF seeks a consultant to update the VineBalance workbook as the basis for a new sustainability certification program for the New York grape and wine industry. The program is intended to start as a pilot program for Yates County grape growers with the intent to expand statewide. The program will serve winegrowers who cultivate *V. vinifera*, hybrid, *V. labrusca* grape varieties.

The purpose of the plan is to provide high level strategic and structural recommendations for certification design based on industry best practices, while balancing the small-scale, independent nature of New York's wine industry.

Working closely with the Sustainability Program Manager and under the direction of the Executive Director and Advisory Committee, the consultant will be responsible for the development an updated and expanded VineBalance certification scheme focused on:

- Hybrid, *V. vinifera* and *V. labrusca* varieties
- Vineyard operations under 100 acres in size

The ideal candidate will be experienced in East Coast climate and agriculture, viticulture and enology, international and domestic standards of sustainable winegrowing, and sustainability certifications deployed by other agricultural industries.

3. Scope of Services:

Phase 1: Benchmarking and Certification Model Evaluation

Assess comparable sustainability certification programs for best practices, allowed and prohibited materials, performance standards, and scoring metrics. Case models include Long Island Sustainable Winegrowing, California Sustainable Winegrowing Alliance, Lodi Rules, Napa Green, LIVE Certified, and Sustainability in Practice.

- Research the certification models of comparable grape and wine sustainability programs.
- Use certification model research to make key recommendations for New York's program.
- Prioritize scope of sustainability assessment to launch pilot program in Yates County with the objective to build towards a statewide certification.
- Develop and present interim report and findings to Sustainability Program Manager, Executive Director, and Advisory Committee.

Deliverables:

Interim report summarizing findings with three to five (3-5) appropriate and informative certification case studies. Propose an updated sustainability scheme that would best fit the needs of the New York wine and grape industry.

Phase 2: Comprehensive Review of the VineBalance Workbook

Complete a comprehensive review of the VineBalance workbook including practices, materials and metrics. Add, remove, or recategorize materials according to the latest scientific research and technology. Adjust scoring metrics to meet current industry standards for sustainable winegrowing. Indicate areas of regional variability based on climate, geography, soil, water, ecosystem and habitat considerations in each American Viticultural Area (AVA) of New York State.

- Evaluate the VineBalance materials list against those used in benchmark sustainable viticulture programs as well as the latest guidance from state and federal agencies.
- Update and expand workbook sections to close gaps addressed by benchmark programs.
- Address points of intersection and divergence of sustainability considerations for hybrid, *V. vinifera* and *V. labrusca* grape growers.
- Address points of regional variability for growers in each of the following AVAs: Finger Lakes, Lake Erie, Long Island, Hudson River Region, Upper Hudson, Niagara Escarpment, and Champlain Valley of New York.
- Prioritize scope of certification necessary to launch pilot sustainability program in Yates County with the objective to build towards a statewide certification program.
- Draft an update to the VineBalance workbook and submit to Sustainability Program Manager, Executive Director, and Advisory Committee for review and feedback.

Deliverables:

Comprehensive update to the VineBalance workbook that can be rolled out as the basis for a statewide sustainable winegrowing certification in the spring of 2022.

4. Project Deliverables:

- **Phase I** Benchmarking and Certification Model Evaluation **due by August 30, 2021**
- **Phase II** Comprehensive Review of the VineBalance Workbook **due by October 4, 2021**
- Final presentation of the updated certification scheme.

The timeframe for the completion of this project is November 1, 2021.

5. Project Budget

The budget for this project will not exceed **\$13,000**. This amount must cover all professional services, legal services, and administrative costs, including all fees, travel, telephone, postage, printing, accommodations, meals (if applicable) and GST.

However, the quality of the technical component of any proposal and the expertise of the consultant will be considered in negotiating the final price for the services to be rendered.

6. Evaluation of Proposal

- Detailed work plan, schedule and budget for this project
- Demonstrated experience with sustainability programs
- Key project personnel and relevant credentials
- Examples of management of similar projects

Authority

The selected agency will work under the direct supervision and with the prior approval of NYWGF for all program activities. All expenditures must fall within the program budget and must be pre-approved by NYWGF.

7. Discrimination Clause

The NYWGF is an equal opportunity employer and does not discriminate based on race, color, national origin, gender, religion, age, disability, political beliefs, sexual orientation, or marital/familial status. The NYWGF complies with all provisions of the U.S. government's Executive Order 11246 dated September 24, 1965, and the rules, regulations and relevant orders of the Secretary of Labor.

8. Instructions for Submitting Proposals

Proposals should be submitted electronically to:

Whitney Beaman
Sustainability Program Manager
Email: vinebalancerfp@nywgf.org

Questions regarding this RFP should be directed to vinebalancerfp@nywgf.org no later than June 23, 2021.

A letter of intent should be sent to vinebalancerfp@nywgf.org no later than June 23, 2021.

All proposals are due by 5:00pm on Wednesday, June 30, 2021.

NYWGF reserves the right not to award a contract if in the opinion of the evaluators, no suitable proposal is received. NYWGF is not liable for any costs associated with any company's response to this RFP.