

Historical Commission  
Town of Westford

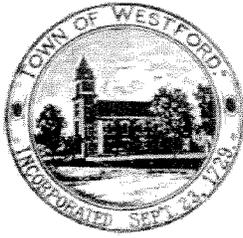


Request for Proposals  
Historical Preservation Planning Support

Issued July 19, 2012  
Proposals due prior to 2 PM on Monday, August 13, 2012



**Westford Historical Commission: RFP for Historical Preservation Planning Support**



Departments of Zoning, Planning,  
Permitting, Conservation and Building  
Town Hall 55 Main Street  
Westford, Massachusetts 01886  
TEL (978) 692-5524 FAX (978) 399-2732

July 19, 2012

To Whom It May Concern:

Enclosed is a complete package of the "Request for Proposal" for consulting services to provide historical preservation planning support to the Town of Westford Historical Commission.

Copies of the Request for Proposals may be obtained or examined beginning July 19 at the Permitting Office, Town Hall 2<sup>nd</sup> floor, 55 Main Street, Westford, MA 01886, from 8:00 a.m. to 4:00 p.m., Monday through Friday, excluding holidays.

Ten (10) hard copies of the proposal must be submitted to:

Town Manager  
Westford Town Hall  
55 Main St.  
Westford, MA 01886

Completed proposals must be received no later than 2 pm on Monday, August 13, 2012. At that time all proposals will be publicly opened and their timely receipt will be confirmed.

**Proposals and Price Proposals** must be submitted in separate, sealed envelopes clearly marked, respectively, "Historical Preservation Planning Support: Proposal" and "Historical Preservation Planning Support: Price Proposal."

The Town reserves the right to accept or reject any and all proposals and make awards as may be deemed in the Town's best interest.

Please do not hesitate to call if you have any further questions.

Sincerely,

Angus Jennings, AICP  
Director of Land Use Management



## Westford Historical Commission: RFP for Historical Preservation Planning Support

### **INTRODUCTION AND PUBLIC NOTICE:**

The Town of Westford, acting through its Historical Commission, is seeking consultant support to assist with implementation of portions of the 2009 Comprehensive Master Plan. A key Action Item in the Comprehensive Master Plan is to expand the Westford Historical Commission's role in town planning, with a supporting Action Item to consider hiring a part-time preservation planner who could also serve as staff for the Historical Commission.

In March 2012, Westford Town Meeting voters allocated Community Preservation Act (CPA) funding to enable the Commission to retain, through a competitive RFP process, a consultant to provide dedicated support to the Commission, and to advance one or more specific policy initiatives. The Historical Commission is issuing this Request for Proposal from qualified individuals or consulting firms to provide the scope of services listed in detail under Scope of Work.

Request for Proposals packages will be available at the **Town of Westford, Permitting Department, 55 Main Street, Westford, MA, 01886 on Thursday, July 19, 2012.**

The Town of Westford will receive ten (10) hard copies of sealed proposals for furnishing "Historical Preservation Planning Support" at the **Town of Westford, Office of the Town Manager, 55 Main Street, Westford, MA, 01886 no later than Monday, August 13, 2012 at 2:00 p.m.**

Proposals and Price Proposals must be submitted in separate, sealed envelopes clearly marked, respectively, "Historical Preservation Planning Support: Proposal" and "Historical Preservation Planning Support: Price Proposal." **No proposal received after the time established for receiving said proposals will be considered regardless of the cause for delay in the receipt of any such proposal(s).**

Questions concerning this Request for Proposals must be submitted in writing to: Angus Jennings AICP, Director of Land Use Management, 55 Main Street, Westford, MA, 01886. Questions may be delivered, mailed, emailed ([ajennings@westfordma.gov](mailto:ajennings@westfordma.gov)) or faxed by the close of business, Thursday, August 2, 2012. Written responses will be emailed or faxed to all proposers on record as having picked up the RFP by close of business on Monday, August 6, 2012. Only answers provided by the Town in writing may be relied upon by the proposers.

The Westford Historical Commission, serving as the selection advisory committee, will evaluate the proposals and recommend an individual or firm for selection subject to approval by the Town Manager. A contract will be executed between the selected consultant and the Town of Westford, acting through the office of the Town Manager.

It is anticipated that a contract will be executed with a qualified individual or firm on or around September 12, 2012, and all services pursuant to the contract shall be complete on or around June 30, 2013. The total contract fees, including any and all expenses, shall not exceed \$39,600.

The Town reserves the right to accept or reject any and all proposals as may be deemed to be in the best interest of the Town.



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### SCOPE OF WORK

The Westford Historical Commission seeks proposals from qualified individuals or firms to provide operational and policy support to the Commission.

Purpose: Historical Preservation Planning Support

Statement of Duties: The selected consultant will complete two categories of work: baseline tasks, to be completed on an ongoing basis throughout the term of the contract; and policy support for one or more policy proposals at the direction of the Historical Commission. Further detail is as follows:

#### 1. Baseline Tasks

- a) **Dedicated Resource.** Commit a minimum number of hours per month dedicated to Historical Commission support throughout the term of the contract, within which this scope of services will be provided. The proposal shall specify the baseline commitment of hours per month.
- b) **Meeting and Action Support.** Attend monthly Historical Commission meetings, generally held on the third Wednesday of each month at 7:30 PM, in addition to additional meetings and site visits as directed, and assist with follow-up actions as directed by the Commission. Attendance at the Commission's September 19, 2012 meeting of the Commission is expected.
- c) **Public Liaison.** Respond to written, telephone and/or email inquiries from Westford staff and public officials regarding historical preservation issues as may be directed by the Chair of the Historical Commission. Provide periodic updates for inclusion on the Town of Westford website. Prepare and/or file periodic correspondences with other Town Boards and Committees as needed to keep them apprised of progress toward historical preservation goals and objectives.
- d) **Grant Support.** Identify grant funding which may support Historical Commission operations and initiatives. Upon identification of appropriate opportunities, lead preparation of one or more grant applications, including coordination among the Commission, town staff and others as appropriate.
- e) **Maintenance Protocols.** Working with the office of the Town Manager, assist the Historical Commission as needed to establish maintenance protocols for two properties under the care and custody of the Historical Commission.
- f) **Permitting Liaison.** Serve as primary liaison between landowners/applicants, the Historical Commission, the Town Planner, municipal staff and others as needed on permitting applications related to the Demolition Delay Bylaw, the Scenic Roads Bylaw, and others as directed by the Commission. (*Note: "Make the demolition delay bylaw more effective" was included as an Action Item within the 2009 Master Plan, and the Master Plan also recommends to "provide incentives for owners of historic structures to seek alternatives to tear-downs and substantial alterations to older historic structures" (pg. 46).*)
- g) **Reporting.** Report to the Director of Land Use Management or designee, and to the Historical Commission Chair, on a regular basis, and to the Commission through



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attendance at monthly meetings, and keep them fully and accurately informed on important matters related to the consultant's activities.

2. **Support for Policy Initiative(s).** The text of the 2009 Master Plan references several potential policy initiatives such as creating "a scenic overlay (zoning) district with a no-disturb buffer along designated roads" (pg. 46); establishment of "development review guidelines for preserving and enhancing existing architectural and historic character and resources" (pg. 46); and creation of one or more Neighborhood Conservation District and/or Local Historic District. There may also be value to designate additional Scenic Roads, and/or propose amendments to the Demolition Delay Bylaw.

At its initial monthly meeting with the consultant, the Historical Commission will provide the consultant with a list of potential policy initiatives under consideration. Prior to the second monthly meeting, the consultant will prepare a briefing memo regarding one or more policy initiatives that could be completed and/or substantially advanced within the term of the contract. At the third monthly meeting, the Historical Commission and the consultant will agree to a work program to satisfy the **Support for Policy Initiative(s)** goal of the CPA funding based on the Commission's priorities and project feasibility.

3. **Supervision:** The consultant will report to the Commission Chair and the Director of Land Use Management.
4. **Compensation:** The consultant will be compensated in accordance with the terms of a negotiated contract with the Town of Westford. Budget range up to \$39,600. The selected consultant will be provided work space in Town Hall and/or the Historical Society Cottage for office hours and on an as-needed basis for work to be completed locally, and will be provided access as needed to printer/copier in the Permitting Department, but will be required to provide any other equipment needed (laptop, software, cell phone etc) as may be needed. Health insurance, liability insurance or additional benefits will not be provided.
5. **Term:** Contract for term of one year from date of execution. Contract may be extended and/or renewed upon mutual agreement and subject to funding availability. In the event that the contract is cancelled or not renewed, for whatever reason, the consultant will be required to transfer to the Town all complete and incomplete work products and materials to support the Commission's ability to advance the work. The Commission will conduct a review after three months, and retains the option to terminate the contract at any time if unsatisfied with results.



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### REQUIRED INFORMATION

Ten (10) hard copies of the proposal must be submitted and the information included in Form 1, included in this proposal, is required in each consultant's qualification and proposal package.

**Proposals** and **Price Proposals** must be submitted in separate, sealed envelopes clearly marked, respectively, "Historical Preservation Planning Support: Proposal" and "Historical Preservation Planning Support: Price Proposal."

### COMPARATIVE EVALUATION CRITERIA

Each proposal will be reviewed based on the following criteria:

- 1. Education.** The Consultant should specify their level of education in Historical Preservation, Planning, Community Development or related field.
  - Highly Advantageous: A Master's or other advanced degree in Historical Preservation, Planning, Community Development or a related field.
  - Advantageous: A Bachelor's degree in Historical Preservation, Planning, Community Development or a related field.
  - Not Advantageous: A Bachelor's or advanced degree in an unrelated field.
  - Unacceptable: No Bachelor's or advanced degree.
- 2. Demonstrated experience implementing historical preservation strategies and action plans at the municipal level.** Experience in the field of historical preservation at the municipal level in the Commonwealth of Massachusetts as evidenced by an extensive knowledge of, among other things, MGL chapter 40C, the Community Preservation Act, programs and resources associated with the Massachusetts Historical Commission, National Register filings, and statutes, regulations and guidelines associated with various state and federal historical preservation policies. The consultant should have demonstrated experience with public outreach and education strategies, and should be able to demonstrate knowledge of how to create incentives for homeowners and developers of historical assets and options for the financing of historical renovation projects.
  - Highly Advantageous: 7 or more years of related experience including at least five examples of high level involvement in the adoption of municipal historical preservation plans or policies and implementation of a historical renovation project. Recognized as subject matter expert regarding Massachusetts historical preservation programs, as demonstrated by authorship of books or articles and presentations at related conferences or seminars.
  - Advantageous: 4-6 years of related experience including at least three examples of high level involvement in the adoption of municipal historical preservation plans or policies and implementation of a historical renovation project. Demonstrated participation in related conferences or seminars.
  - Not Advantageous: 1-3 years of related experience including at least one example of high level involvement in the adoption of municipal historical preservation plans or policies and in the implementation of a historical renovation project.
  - Unacceptable: Less than one year of related experience.
- 3. Presentation.** Writing skills and the ability to make persuasive public presentations, based on the town's evaluation of the quality of the written proposal; review of the consultant's prior experience presenting in public forums and, for those consultants selected for interview, evaluation of quality of interview.



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Highly Advantageous: Excellent written and verbal presentation ability.

Advantageous: Very good written and verbal presentation ability.

Not Advantageous: Average written and/or verbal presentation ability.

Unacceptable: Poor written and/or verbal presentation ability.

4. **Community Understanding.** Understanding of the importance of building community awareness of and support for the town's historical preservation policy objectives, and ability to communicate effectively with the public. Preference may be given to an individual applicant over a firm if it is believed that an individual may more effectively build a relationship with the community.

Highly Advantageous: Prior experience on 5 or more historical preservation initiatives in Massachusetts municipalities with a Town Meeting form of government. Familiarity with the Town of Westford and/or the immediate region, including the particular development trends affecting historical properties and resources in the region.

Advantageous: Prior experience on 2 to 5 or more historical preservation initiatives in Massachusetts municipalities with a Town Meeting form of government. Familiarity with the Town of Westford and/or the immediate region, including the particular development trends affecting historical properties and resources in the region.

Not Advantageous: Prior experience on 1 historical preservation initiative in a Massachusetts municipality with a Town Meeting form of government.

Unacceptable: No prior experience on historical preservation initiatives in Massachusetts municipalities with a Town Meeting form of government.

### METHOD OF SELECTION:

**Proposals and Price Proposals** must be submitted in separate, sealed envelopes clearly marked, respectively, "Historical Preservation Planning Support: Proposal" and "Historical Preservation Planning Support: Price Proposal."

Complete proposals will be reviewed and evaluated by the Westford Historical Commission, with non-voting participation of the Assistant Town Manager and the Director of Land Use Management. The selection committee may interview one or more consultants meeting the qualification requirements. Upon rating the proposals based on the Comparative Evaluation Criteria the Historical Commission will submit its recommendation to the office of the Town Manager which, acting in its capacity as the town's Chief Procurement Officer, will work to execute a contract with the recommended consultant subject to approval by the Town Manager.

The Town of Westford reserves the right to reject any and all proposals and parts of any and all proposals, and to waive any or all conditions, terms or requirements of this Request for Proposal. The contract will be awarded to the most advantageous proposal from a responsive and responsible proposer taking into consideration price and evaluation criteria. Cost shall not be a sole consideration for consultant selection.



## Form 1: Required Information – Proposal

All proposals shall include the following information:

1. Cover letter with description of consultant including type of organization (i.e. individual, corporation, partnership, joint venture, etc) including a list of the principals.
2. A narrative proposing how the consultant plans to address:
  - a. each of the Tasks included in the Scope of Work herein.
  - b. the number of baseline hours proposed per month (see Scope of Work item 2(a))
  - c. a discussion of how the consultant proposes to meet this baseline commitment through the term of the contract while providing enough time during peak months, such as in support of a policy proposal.
  - d. demonstrated experience implementing historical preservation strategies and action plans at the municipal level.
3. List all current projects of principal staff including the following information for each project:
  - a. Location
  - b. Scope
  - c. References (name, title, and current contact information)
  - d. Start date and projected completion date
4. List three or more relevant public projects undertaken in Massachusetts in the past three years. Please include the following information for each project:
  - a. Location
  - b. Scope
  - c. References (name, title, and current phone numbers)
  - d. Start date, projected completion date, and actual completion date
5. A list of any litigation pending on any of your projects.
6. Résumés for each of the principal consulting staff and key personnel to be associated with the project:
  - a. Name, mailing and email address and telephone number
  - b. Education
  - c. Prior work experience
7. A **Price Proposal** in a separate, sealed envelope. There is no specified format for the price proposal but the consultant shall include proposed hourly rates for personnel, shall specify whether the proposed price is inclusive of anticipated expenses, and shall specify whether travel time will be billed and if so at what rate and/or submitted for mileage reimbursement. The price proposal shall be submitted in a separately marked envelope.