

**REQUEST FOR PROPOSALS
HISTORIC PRESERVATION DESIGN GUIDELINES**

RFP Issue Date: NOVEMBER 20, 2023

Proposal Due: DECEMBER 22, 2023



Submit to:

**John Simmons
Community Development Director
200 South Osage Ave.
Sedalia, MO 65301**



Let's Cross Paths

REQUEST FOR PROPOSALS

City of Sedalia, Missouri Historic Preservation Design Guidelines Project

Date of Release of this Request for Proposal: November 20, 2023

Closing Date: All responses to this RFP should be received by: December 22, 2023

Summary of Request for Proposal:

The City of Sedalia is soliciting proposals for consultant assistance to develop residential and commercial design guidelines that may be used in the city's three historic districts. This project is a matching grant project being partially funded through the Missouri Department of Natural Resources, State Historic Preservation Office.

Contact Information:

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This project is partially funded by a grant from the Missouri Department of Natural Resources, State Historic Preservation Office and the U.S. Department of the Interior, National Park Service. Grant awards do not imply an endorsement of contents by the grantor. Federal laws prohibit discrimination on the basis of race, religion, sex, age, handicap or ethnicity. For more information, write to the Office of Equal Opportunity, U.S. Department of the Interior, Washington D.C. 20240.

The contractor selected will be required to adhere to all information supplied in this RFP, be responsible for working with the City Community Development Department and Historic Preservation Commission, and meet all applicable federal and/or state requirements for professional qualifications to conduct this project.

General Instructions and Conditions

Summary of Sedalia, Missouri and the Historic Districts

The City of Sedalia, Missouri (City) has a strong commitment to historic preservation and providing protection for designated historic resources that lie within its boundaries. This commitment was formalized by establishing the Historic Preservation Commission by ordinance

in 2015. The Missouri Department of Natural Resources' State Historic Preservation Office (SHPO) designated Sedalia as a Certified Local Government in 2016.

As part of the ordinance creating the Sedalia Historic Preservation, the City adopted basic, voluntary design guidelines that provide guidance on the acceptable guidelines for the renovation, repair and maintenance of the exterior of properties located within the historic districts. The City has one National Register commercial historic district and is currently conducting a reconnaissance survey to determine potential residential historic districts.

Summary of Grant Project Exceptions for Proposals and Response to This RFP

The city, in conjunction with the State Historic Preservation Office (SHPO) staff overseeing the grant project, have agreed to the time frame outlined in the milestones and other aspects of reporting for this project are approximate and are sufficiently generous that it should not be necessary to substantially modify the schedule for the project. See attached milestones.

This RFP is being solicited as a fixed-price contract and responses will be scored not only on cost, but the respondent's ability to complete the work within the allotted time. The fixed costs available for this project are \$20,000.00 federal share, plus \$20,000.00 local share for a total project amount of \$40,000.00, as outlined in the Historic Preservation Fund Grant Agreement, attached. In addition the City will provide \$10,000 in staff support and supplies up to \$1,000.00.

Scope of Work

The City of Sedalia must hire a qualified historian or architectural historian to complete the design guidelines in conformance with grant agreement.

Please see Attachment A for the scope, purpose and description of grant activities included in the City of Sedalia's grant agreement with the State of Missouri's State Historic Preservation Office (SHPO).

Qualifications

The City of Sedalia must hire a consultant that meets the *Secretary of the Interior's Professional Qualifications* in order to prepare design guidelines for the City of Sedalia's historic districts.

In addition to meeting the Secretary of the Interior's Professional Qualifications as outlined above, please list examples of related work as pertaining to the development of historic preservation design guidelines that would provide comparative examples of experience concerning this grant project.

Proposal Response Date and Location

The Community Development Department must receive the vendor's proposal in a sealed envelope no later than **2:00 pm (CST) on Friday, December 22, 2023**. Proposals arriving after the deadline will not be opened or considered. All proposals and the accompanying documentation will become the property of the City of Sedalia and may not be returned. One (1) original and four (4) copies of this proposal must be submitted. Proposals must be clearly marked on the outside of the package. Postmarking by the due date will not substitute for actual proposal receipt.

Proposal Schedule:

Proposal Release: Friday, November 20, 2023

Proposal Due Date: Friday, December 22, 2023

Award Date: Monday, March 18, 2024

The City of Sedalia reserves the right to reject any or all proposals at any time without penalty.

Proposal Requirements/Evaluation Criteria

The City will evaluate all written submittals. It is incumbent upon the proposers to demonstrate within their proposal how each requirement will be satisfied. All Proposals must meet the specifications outlined in the Proposal.

The following criteria, not listed in order of importance, will be used to evaluate proposals.

- Price for completing scope of work.
- Proposer’s qualifications as a preservation consultant (including education, professional certifications, work experience, etc.; and experience in developing design guidelines should be demonstrated.
- Depth of the proposer’s experience in developing architectural design guidelines, including samples of similar projects previously completed and the community name and contact information.
- Responsiveness to the RFP.
- Ability of Proposer to meet the project schedule within the noted deadlines.

Proposer Requirements

Qualifications:

- Historic preservation, rehabilitation, and /or related experience are required by the owner and operator. Demonstrated ability in a project and/or projects similar in nature is required.
- Candidates submitting proposals should be certain to provide the following information in the proposals:
 - List of completed similar projects, including project name, location, nature of work, date completed, project cost, contact name, email address, physical address and phone number.
 - Evidence of required licenses, permits, and professional qualifications, as applicable. Indicate any liability coverage your firm has and the amount of coverage.
 - Organizational history, including years in business and resumes of all partners, associates or consultants employed in your firm who will be working on this project.
 - Listing of trade or other references you feel are important.

Selection Criteria

Experience on Similar Projects	50%
Qualifications	25%
Price	15%
Responsiveness to RFP	10%

Scope of Services:

The project will consist of work as follows:

The Consultant will be expected to revise the City of Sedalia Design Guidelines to include guidelines for the residential properties and the commercial properties. The newly written design guidelines may incorporate previously written design guidelines. Updated design guidelines manual shall include the following:

1. Introductory information including: table of contents, district identification information (including district location, district boundaries, listing on historic registries), and an executive summary.
2. Explanation and text of the historic preservation ordinance.
3. Explanation of the historic preservation commission and the review process, including Certificate of Appropriateness application and review process, application forms, appeals process and other related regulations, as applicable
4. Brief history of the historic districts, including its historical development, significant properties, and designed period of significance.
5. Identification of district historic character-defining features, including but not limited to: road patterns, lot configurations, building-to-building and building-to-site relationships, building types and styles, building materials, features and details, building uses, landscape features, and streetscape features. Identification should include photographs of representative examples taken from district.
6. Guidelines for treatment of historic properties including but not limited to: maintenance, alterations, additions, and appropriate treatment of historic features. Recommendations should follow the ***Secretary of the Interior's Standards for the Treatment of Historic Properties***.
7. Guidelines for new construction including but not limited to: acceptable locations, site setting and orientation, setbacks, size, height, styles, materials and design of various features such as windows, doors, roofs, etc.; guidelines for new construction should be based on identified preservation goals developed for the historic district through a public planning process. While new construction should be compatible with and complement existing historic properties, it does not need, nor should it, replicate existing character- defining features.
8. Guidelines for landscape plans and construction activities including but not limited to: streetscape improvements, utilities, tree preservation, fences, retaining walls, parking, paving materials, and lot size.
9. Guidelines for demolition, neglect of properties, and relocating buildings.
10. Resources and references, including but not limited to: Glossary of Terms, the *Secretary of the Interior's Standards for the Treatment of Historic Properties* and associated guidance materials such as Preservation Briefs, local historic district regulations and other applicable laws and regulations, applicable forms and applications and lists of available resources with contact information.

General and Grant Requirements:

- A. The Consultant is expected to keep the City's Project manager informed of the status of the project on a regular basis.
- B. All work under the terms of this project must be completed and final products submitted to the City no later than April 30, 2025. The first draft of the design guidelines manual

shall be submitted to the City on or before July 1, 2024; the second draft of the design guidelines manual shall be submitted to the City on or before November 1, 2024; while a final draft shall be submitted to the City on or before March 3, 2025.

- C. The Consultant shall work with the City staff to establish no less than three public meetings. All meetings shall be held at an agreed upon date and time with City staff to allow for promotion of meeting to ensure the highest involvement possible.
- D. The Consultant will provide the City with a final digital version of all documents, graphics and graphic images for the City’s use on the City’s website and all related marketing or educational purposes.
- E. The Consultant shall provide the City with an editable version (Microsoft Word) of the final documents.

PROJECT SCHEDULE

The schedule for the selection process and project timeline is as follows. A response to this RFP shall indicate the Proposer’s ability to comply with the project timeline.

Due Date	Product
November 2023	Solicit Request for Proposals with Qualifications of Consultant
March 19, 2024	Email Submission of signed consultant contract to the HPF Grant Manager
April 15, 2024	Meeting and documentation of discussion between the consultant, the City of Sedalia, and the HPF Grants Manager or their designee.
June 3, 2024	Completion and documentation of first public meeting
July 1, 2024	First Draft of the Design Guidelines (30% Completion)
October 1, 2024	Completion and documentation of second public meeting
November 1, 2024	Second Draft of the Design Guidelines (70% Completion)
March 3, 2025	Final Draft of the Design Guidelines and completion and documentation of the third public meeting.
April 1, 2025	Link to the Design Guidelines on the City of Sedalia’s website.
May 1, 2025	Submission of final project report and fiscal data to the HPF Grant Manager.

**ATTACHMENT A:
SCOPE, PURPOSE AND DESCRIPTION OF GRANT ACTIVITIES**

City of Sedalia
Design Guidelines for Historic Residences
Project No. P23AF00890-007

Starting Date: September 15, 2023

Ending Date: May 15, 2025

I. SCOPE AND PURPOSE:

The City of Sedalia will hire an architectural historian (herein referred to as the "consultant") who meets the Secretary of the Interior's Professional Qualifications to work with the City of Sedalia and the Historic Preservation Commission to develop and adopt Design Guidelines that can be used with all local historic districts of residential character. The design guidelines for this project are intended to be general and utilized by newly established historic districts until more specific guidelines can be written. The new Design Guidelines will be used to protect the irreplaceable historic character of Sedalia.

The new Design Guidelines will illustrate the design review criteria listed in Section 64-70 of the *Code of Ordinances* as has been established by the city's Historic Preservation Commission. These guidelines will provide guidance to those applying for Certificates of Appropriateness (COA) and assist the members of the Historic Preservation Commission in reviewing a COA for approval. They will also help city staff and elected officials to understand the city's expectations for the issuance of a COA when required for a property within this historic district.

Developing local guidelines is an eligible grant assisted activity for the Historic Preservation Fund (HPF Grants Manual Chapter 6(G)(c)). These Design Guidelines advance Goal 5 "Integrate historic preservation strategies into planning and routine procedures at all levels of government" of Missouri's 2018-2024 Statewide Preservation Plan.

II. ACTIVITIES AND FUNCTIONS:

City staff will serve as the primary point of contact for this project and will be expected to ensure milestones are submitted to the Historic Preservation Fund (HPF) Grant Manager on a timely basis.

A. Consultant Selection Process

The City of Sedalia will hire a professional who meets the *Secretary of the Interior's Professional Qualifications Standards* for an architectural historian, as outlined in Exhibit 1, to conduct the survey. The Request for Proposal (RFP) sent to consultants shall include a copy of Attachment A: Scope, Purpose and Description of Grant Activities, the Milestone Schedule, and Exhibit 3 from the Grant Agreement with budgetary information removed. Pursuant to 2 CFR 200.331, the sub-recipient shall require the language of the certification and terms applicable to financial assistance awards to be included in sub-award documents at all tiers, and sub-recipients shall certify and disclose accordingly. All contractual deadlines with the consultant shall not conflict with milestone deadlines set in the grant agreement. A draft of the RFP will be sent to the HPF Grant Manager **prior to initiating the bid process**. Documentation of the consultant selection process and a draft of the consultant contract shall be submitted to the HPF Grant Manager or their designee for approval **before it is signed**.

The consultant selection process shall produce the following products:

1. A **draft of the RFP** for review prior to the initiation of the bid process.
2. A documentation of the **consultant selection process** and a draft of the consultant contract **prior to signature**. This documentation includes:
 - a. Indication of who the RFP was sent to and when
 - b. Copies of all responses received (proposals and responses of no bid)
 - c. Score sheets/an explanation for why a consultant was chosen
 - d. The unsigned draft consultant contract noted above
3. A copy of the signed **consultant contract**.

B. Preparation of New Design Guidelines

The consultant will prepare the new Design Guidelines document based on guidance from Sedalia's Historic Preservation Commission. The design guidelines for other cities should be reviewed to understand how they express and illustrate preservation concepts. Upon request the SHPO office can provide links to example design guidelines for other Missouri communities. The new Design Guidelines shall include sections for, but not necessarily be limited to rehabilitation of residential buildings, buildings to be constructed as infill on empty lots, (both fixed and moveable), site planning, street furniture and streetscape. They shall also include information on the maintenance, repair and replacement of materials as well as guidance on new construction in future districts.

The Commission should provide to the consultant what they have identified as the special character of historic residential properties in the City of Sedalia and the properties needing to be protected. The consultant shall work with the Commission while drafting an illustrated history that identifies significant characteristics and features of the City and how they may be treated under the *Secretary of the Interior's Standards and Guidelines for the Treatment of Historic Properties*.

Drafts of the new Design Guidelines at approximately 30% and 70% will be required to be submitted to the SHPO for review, comment, and approval. The definitions of 30% and 70% will be determined in consultation between the consultant, the city, and the SHPO. They shall include as much visual data as is practicable to demonstrate the various recommendations, including line drawings, photographs, plans, renderings and/or other graphics. Photographs and renderings are preferred to be in color; line drawings and plans may be in black and white. Each draft will contain the visual data expected to be used for the text that is included when it is submitted to the SHPO for review.

At least one month prior to submitting each version (30%, 70% & 100%) of the new Design Guidelines to SHPO the consultant shall make a presentation to the Historic Preservation Commission with the general public invited. During these presentations the consultant will actively solicit ideas to incorporate into the new Design Guidelines and address questions from those in attendance. For each presentation the consultant shall provide adequate notice to be placed on the Historic Preservation Commission agenda and to allow the city to post notice to the public for at least two weeks. A sign-in sheet will be required to be kept and provided to the SHPO for each presentation.

The Design Guideline process shall produce the following products:

1. The consultant will set up a time with the HPF Grant Manager or their designee to discuss the expectations of the project before it begins. An email documenting the discussion will be sent to the HPF Grant Manager or their designee by the consultant.

2. Documentation of the first public meeting, including press release, newspaper/web advertisement and sign-in sheet.
3. A first draft of the Design Guidelines (30%) in Word format. If the document size exceeds 10MB a means acceptable to SHPO for submitting besides email will need to be used to deliver the draft document.
4. Documentation of the second public meeting, including press release, newspaper/web advertisement and sign-in sheet.
5. A second draft of the Design Guidelines (70%) in Word format. If the document size exceeds 10MB a means acceptable to SHPO for submitting besides email will need to be used to deliver the draft document.
6. Documentation of the third (final) public meeting, including press release, newspaper/web advertisement and sign-in sheet.
7. The final version of the new Design Guidelines in electronic format using an approved file transfer option
8. A link to the final version of the new Design Guidelines on the City of Sedalia's website. The Design Guidelines will be posted to the city's website and will continue to be publicly posted until a newer version of the document is developed.

III. SPECIAL CONDITIONS

- A. As a recipient of a federal subaward, the City of Sedalia is subject to the requirements of 2 CFR 200.1 "Subaward", 200.101 "Applicability", and 200.331 "Requirements for pass-through entities."
- B. The procedures and requirements contained herein are subject to applicable laws and regulations, and any changes made to these laws and regulations, subsequent to the execution of this agreement. In the event that these procedures and requirements conflict with applicable federal laws, regulations and policies, the following order of precedence will prevail:
 1. Federal law
 2. Code of Federal Regulations
 3. Terms and conditions of grant award
 4. Historic Preservation Fund Grant Manual

The provisions included herein shall also be applied by the State to subgrantees and contractors performing work under this program.

- C. It is agreed that if the project should fall one (1) month behind the milestones, the Missouri Department of Natural Resources has the right unilaterally to terminate or reduce the dollar amount of this agreement. In addition, if the Department determines that full termination is warranted, the Department shall be sole authority in determining the amount of compensation owed.

- D. All work requiring expertise in history, archaeology, architectural history, architecture, or historic architecture will either be supervised or completed by personnel who meet the *Secretary of the Interior's Professional Qualifications* as listed in Exhibit 1.
- E. All content related to the treatment of historic properties shall conform to the *Secretary of the Interior's Standards for the Treatment of Historic Properties with Guidelines for Preserving, Rehabilitating, Restoring & Reconstructing Historic Buildings*. The Standards and Guidelines can be found here: [https://www.nps.gov/orgs/1739/upload/treatment-guide lines- 2017-part1-preservation-rehabilitation.pdf](https://www.nps.gov/orgs/1739/upload/treatment-guide%20lines-2017-part1-preservation-rehabilitation.pdf) and [https://www.nps.gov/orgs/ 1739/upload/treatment-guidelines-2017-part2-reconstruction-restoration .pdf](https://www.nps.gov/orgs/1739/upload/treatment-guidelines-2017-part2-reconstruction-restoration.pdf)
- F. The Sedalia Historic Preservation Commission will have an opportunity to review and comment on milestone products before they are submitted to the HPF Grant Manager or their designee if they so choose. Any Commission comments will be submitted with the corresponding milestone to the HPF Grant Manager or their designee.
- G. All grant project funded publications, books, brochures and all public meeting notices regarding this grant project shall include the following acknowledgement:

This material was produced with assistance from the Historic Preservation Fund, administered by the National Park Service, Department of the Interior, of the U.S. Government and Missouri Department of Natural Resources, State Historic Preservation Office. Any opinions, findings, and conclusions or recommendations expressed in this material are those of the author(s) and do not necessarily reflect the views of the Department of the Interior or the Department of Natural Resources, State Historic Preservation Office, nor does the mention of trade names or commercial products constitute endorsement or recommendation.

[This acknowledgement may be in any size type on the notice]

- H. The HPF Grants Manager or their designee shall approve all rates of pay above the minimum wage for costs in the Personnel category. Costs in the Personnel category will conform to the HPF Grants Manual Chapter 13 (B)(12) and 2 CFR 200.430. The City of Sedalia staff is expected to track staff hours and volunteer time using Appendix C of the *Requesting Reimbursement for Grant Expenditures* Packet included as Exhibit 2. Reimbursement of Personnel costs shall not occur without documentation of the time spent and the rate of pay.

Project work will be completed and payments made according to the milestone/payment schedule and project budget that follows.

MILESTONE / PAYMENT SCHEDULE
 City of Sedalia
 Design Guidelines for Historic Residences
 Project No. P23AF00890-007

Starting Date: September 15, 2023

Ending Date: May 15, 2025

Milestone	Product	Date Due	Federal	Non-Federal
			Share	Share
#1	Draft RFP and/or RFQ submitted to the HPF Grant Manager or their designee before the bid process is initiated.	10/02/2023	\$ 0	\$ 0
#2	Documentation of the consultant selection process and a draft of the consultant contract prior to signature submitted to the HPF Grant Manager or their designee for review and approval.	2/15/2024	\$ 0	\$ 0
#3	Copy of signed consultant contract	03/15/2024	\$ 0	\$ 0
#4	An email documenting the discussion between the consultant, the City of Sedalia, and the HPF Grants Manager or their designee	04/15/2024	\$ 0	\$ 0
#5	Documentation of the first public meeting	6/03/2024	\$ 0	\$ 0
#6	First Draft of the Design Guidelines (30% Completion)	7/01/2024	\$ 0	\$ 0
#7	Documentation of the second public meeting	10/01/2024	\$ 0	\$ 0
#8	Second Draft of the Design Guidelines (70% Completion)	11/01/2024	Estimated 50% of expenses	Estimated 50% of expenses
#9	Final Draft of the Design Guidelines; Documentation of the third and final public meeting	3/03/2025	\$ 0	\$ 0
#10	Link to the Design Guidelines on the City of Sedalia's website	4/01/2025	\$ 0	\$ 0
#11	Submission of final project report and fiscal data.	05/01/2025	Estimated remaining expenses	Estimated remaining expenses
	TOTALS:		\$20,000	\$31,000

Attachment A: Exhibit 1
The Secretary of the Interior's Professional Qualifications
Published in 48 FR 44738-44739 (1983)

The following requirements are those used by the National Park Service, and have been previously published in the Code of Federal Regulations, 36 CFR Part 61. The qualifications define minimum education and experience required to perform identification, evaluation, registration, and treatment activities. In some cases, additional areas or levels of expertise may be needed, depending on the complexity of the task and the nature of the historic properties involved. In the following definitions, a year of full-time professional experience need not consist of a continuous year of fulltime work but may be made up of discontinuous periods of full-time or part -time work adding up to the equivalent of a year of full-time experience.

History

The minimum professional qualifications in history are a graduate degree in history or closely related field; or a bachelor's degree in history or closely related field plus one of the following:

1. At least two years of full-time experience in research, writing, teaching, interpretation, or other demonstrable professional activity with an academic institution, historic organization or agency, museum, or other professional institution; or
2. Substantial contribution through research and publication to the body of scholarly knowledge in the field of history.

Archeology

The minimum professional qualifications in archeology are a graduate degree in archeology, anthropology, or closely related field plus:

1. At least one year of full-time professional experience or equivalent specialized training in archeological research, administration or management;
2. At least four months of supervised field and analytic experience in general North American archeology; and
3. Demonstrated ability to carry research to completion.

In addition to these minimum qualifications, a professional in prehistoric archeology shall have at least one year of full-time professional experience at a supervisory level in the study of archeological resources of the prehistoric period. A professional in historic archeology shall have at least one year of full-time professional experience at a supervisory level in the study of archeological resources of the historic period.

Architectural History

The minimum professional qualifications in architectural history are a graduate degree in architectural history, art history, historic preservation, or closely related field, with coursework in American architectural history; or a bachelor's degree in architectural history, art history, historic preservation or closely related field plus one of the following:

1. At least two years of full-time experience in research, writing, or teaching in American architectural history or restoration architecture with an academic institution, historical organization or agency, museum, or other professional institution; or

2. Substantial contribution through research and publication to the body of scholarly knowledge in the field of American architectural history.

Architecture

The minimum professional qualifications in architecture are a professional degree in architecture plus at least two years of full-time experience in architecture; or a State license to practice architecture.

Historic Architecture

The minimum professional qualifications historic in architecture are a professional degree in architecture or a State license to practice architecture, plus one of the following:

1. At least one year of graduate study in architectural preservation, American architectural history, preservation planning, or closely related field; or
2. At least one year of full-time professional experience on historic preservation projects. Such graduate study or experience shall include detailed investigations of historic structures, preparation of historic structures research reports, and preparation of plans and specifications for preservation projects.