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Request for Proposals

Contact: Meredith S. Crandall, Montpelier Planning and Zoning Administrator

Date of Issue: Tuesday, May 4, 2021

Questions Due by: 11:59 PM, Monday, May 24, 2021

Submissions Due by: 4:30 PM, Friday, June 4, 2021

I. INTRODUCTION

The City of Montpelier adopted new, detailed Design Review Overlay District Regulations (Section 2201) during a package of revisions to its Unified Development Regulations in 2020. Now that the revised regulations have been adopted, the next step is to develop complementary Design Review Guidelines to: (i) aid citizens and developers in preparing permit applications for projects within the Overlay District; (ii) educate the same audience on the benefits of historic preservation; and (iii) assist City volunteers and staff in administering and enforcing the same regulations.

The City is looking for a consultant to: (a) draft new Design Review Guidelines for Montpelier, that will be web-friendly—but printable in pamphlet form; (b) incorporate select images, figures, and photographs into the Guidelines, as provided to consultant by the city Staff; (c) draft select figures for the Guidelines; (d) attend several public meetings; and (e) assist as needed with revisions to the Guidelines following public input.

Consultant will work collaboratively with the Montpelier Historic Preservation Commission (HPC) and select City Staff during this process.

Funding for this project is being provided by the CLG Program administered by the Vermont Division for Historic Preservation (DHP). This Request for Proposals (RFP) is intended to aid the City in the competitive selection of a qualified consultant.

II. PROJECT OBJECTIVE AND AUDIENCE

The objective of this project is to develop illustrated guidelines to assist the public in understanding the updated standards for exterior building and site alterations within the Design Review Overlay District, as well as help City volunteers and staff in administering those standards. The expected product is a web-friendly, but also printable in pamphlet form,

set of design review guidelines to serve as a resource for applicants, property owners, developers, staff, and others. The ultimate goal, is something similar in style and form to those used by Shelburne, Vermont, but consistent in organization and content with Montpelier's Design Review Regulations, and with tailored photographs and illustrations. The full text of the Design Review Guidelines for Shelburne, Vermont, are available here: <https://www.shelburnevt.org/DocumentCenter/View/2013/Design-Review-Guidelines->

These Guidelines are a final step in the City's long-time goal of updating and elaborating on design review criteria that have been in place since the 1970's. The recently updated Regulations and Guidelines involved in this project are part of an even larger plan, which included the previously completed update to the survey of the City's Historic District and updating the related listing on the National Register of Historic Places.

As noted in the City's application for funding from the CLG program, the audience for the project includes: (i) property owners and developers who require permits under the City's zoning ordinance; (ii) the Montpelier HPC, Design Review Committee (DRC), and the Development Review Board who need to apply the Design Review regulations; and (iii) the Department of Planning and Community Development staff who assist all of these stakeholders.

When completed, the proposed design review guidelines will be presented to the Montpelier Planning Commission and subsequently Montpelier City Council.

III. PROJECT CONTEXT AND BUDGET

The City of Montpelier has one of the largest National Register historic districts in the state, a Designated Downtown, and a Design Review Overlay District. The City is widely recognized for its walkability, historic character, and engaged citizenry. For over forty years, the City has had a design review element within its zoning ordinance and has continually recognized the importance of design review in maintaining the historic character of the City. As time goes by and development and redevelopment take place in the City, the potential for negative cumulative changes will be very real. Historic preservation is seen as a critical part of the City's efforts to retain the character and integrity of the City.

Funding for the project is modest and the budget will require careful management by the consultant or team engaged to complete the work. A total of \$15,000 is available for consultant services from the Certified Local Government grant-in-aid from the State of Vermont, which is part of the funds granted to the State by the United States Department of the Interior, National Park Service, for the Certified Local Government Program share of the State's Annual Program Grant under the provisions of the National Historic Preservation Act of 1966 (P.L. 89-665), as amended. Proposals with budget over \$15,000 will not be excluded from consideration. The project could be broken into multiple phases, with future funding opportunities. **Therefore, for a budget amount exceeding \$15,000, the City requests a justification and the option to discuss stages of development.**

The HPC is comprised of members with significant professional experience in historic preservation, architecture, and preservation planning. It is intended that the Commission and City Staff will work closely with the consultant to complete the project.

IV. GEOGRAPHIC AREA OF INTEREST

The area of interest for this project is defined by the boundaries of the Montpelier National Register Historic District and Design Review Overlay District.

V. ANTICIPATED SCOPE OF WORK

This project will be a collaborative process, involving the chosen Consultant, HPC, and City Staff.

A. The chosen Consultant will be responsible for:

1. Reviewing the City's current design review regulations and preparing an initial draft of the table of contents for the Guidelines, and a list of potential illustrations and photographs to incorporate, for the Historic Preservation Commission and City staff's review.
2. Following input/direction from the HPC and City staff, writing the first draft of the Guidelines.
3. Recommending and drafting selected diagrams and illustrations, as directed by HPC and City Staff, and inserting photographs as provided to consultant by the City.
4. Attending regular HPC meetings and at least one special meeting for presentation of the draft Guidelines to the public, assist with answering questions.
5. Responding to questions presented by the Planning and Zoning Administrator via email or telephone.
6. Assisting with content revisions to the first draft Guidelines as requested following community and City input, to create Consultant's "Final Draft."
7. Formatting the Guidelines into both a web-friendly version and a version that can be printed in pamphlet form.

B. City Staff and the HPC will be responsible for:

1. Taking the lead in informing and obtaining input from the public, including press releases, scheduling public meetings, mailings, social media, and other avenues.
2. Providing consultant with photographs of example buildings for incorporating into the Guidelines.
3. Responding to questions from the public or other City staff, appointees, and elected officials.
4. Reviewing consultant's outline, illustration/photograph list, and drafts, and providing clear direction on choices and revisions, as applicable.

C. Exclusive City Staff responsibilities:

1. Any consultant hired to undertake the project will work primarily with the

Montpelier HPC and City staff to complete it. The project coordinator will be the Planning and Zoning Administrator, Meredith Crandall, who also staffs the HPC and will act as the principal contact with the consultant. See Section X for contact information.

2. Creating the City webpage for hosting the Guidelines.

As stated in Section III, the total budget for the above work should not exceed \$15,000. However, where consultant cannot accomplish all elements within \$15,000, they can propose a phased project as described in Section III.

VI. DELIVERABLES

- A. Deliverables that must be provided as part of this project, and therefore addressed in any Proposal, with requisite percentage of project cost payable upon receipt of each:
 1. Draft table of contents for the Guidelines — 5%
 2. List of suggested diagrams, illustrations, and photographs — 5%
 3. First draft Guidelines: simple format (i.e., not pamphlet or web-ready) acceptable — 40%
 4. Final draft Guidelines: in both web-friendly and pamphlet printable format, and able to be edited further by City staff as needed. — 40% (final 10% of project cost withheld until final deliverable is received and found to be satisfactory).
- B. Deliverable Format, Ownership, and Deadlines:
 1. All documents should be provided in both hard copy (paper) and digital format. All printed copies of draft and final reports shall be printed on both sides (i.e. double-sided).
 2. All data, databases, reports, programs, illustrations, photographs, and other materials, in digital and hard copy format, created under this project shall be transferred to the City of Montpelier upon completion of the project and will become the property of the City of Montpelier.
 3. Documents should be submitted a minimum of one full week prior to any public meetings at which they will be discussed. In addition, one unbound camera-ready copy of the materials will be provided to the City of Montpelier.

VII. SCHEDULE/MILESTONES

The City estimates that a substantial percentage of consultant's portion of the project will take approximately six (6) months to complete, with availability for work product revisions based on stakeholder input over an additional five (5) months. This schedule is due, in part, to allow full review by the HPC which typically meets only once a month.

Date	Task/Product Completed
July –Sept. 2021	Consultant to work with HPC and city staff to outline sections for Guidelines and any necessary phases to development, delivery of draft table of contents and list of suggested diagrams, illustrations, and photographs.
Sept.- November 2021	Consultant to prepare draft Design Review Guidelines and coordinate with City staff and HPC to on incorporation of photographs and diagrams.
November 15, 2021	Consultant to provide the following Draft Proposed Design Review Guidelines in pamphlet printable form, for presentation by HPC at a public meeting in November 2021.
December 2021–February 2022	Consultant available to respond to questions and provide some limited revision assistance, pending input from stakeholders.
April 15, 2022	Consultant to provide the final draft deliverables: 1) Proposed Design Review Guidelines in web-friendly format; and 2) Proposed Design Review Guidelines in pamphlet printable form.
April–May 2022	Consultant available to respond to questions and any necessary corrections pending final approval by HPC and city staff.

Respondents to this RFP are asked to provide evidence of their ability to meet these or similar milestones. When addressing their ability to meet the milestones, consultants should present schedules reflecting their understanding of the project, good planning practice, and the requirements of the CLG program.

VIII. RFP RESPONSE FORMAT AND METHOD

A. Submittals should not exceed 10 pages.

B. Responses to this RFP should consist of the following:

1. A brief cover letter expressing the consultant’s interest in working with the City of Montpelier.
2. A brief introduction to the consultant.
3. A brief summary of the relevant qualifications of the consultant.
4. Detailed budget broken down by deliverables, and list of anticipated staff and subcontractors to be utilized.
5. Billing rates of relevant key individuals that will be working on the project.
6. A brief statement demonstrating the consultant’s success on similar projects, including a brief project description and a contact name and address for each reference.
7. A representative work sample similar to the type of work being requested, which may be provided with links to the final work product or PDF examples. This shall not count toward the page limit.
8. At least one letter of reference from a contact for a prior, similar project. This shall not count toward the page limit.
9. If the consultant so chooses, a description of the approach it would recommend completing the project may also be provided. This description shall not count

toward the page limit.

- C. Method of Responding: Consultants interested in this project must submit their materials via email to Meredith S. Crandall, Planning and Zoning Administrator, City of Montpelier at mcrandall@montpelier-vt.org. Paper copies are not desired or required.

IX. CONSULTANT SELECTION

The consultant selection will be made by a committee consisting of representatives of City staff and the Historic Preservation Commission, which will then require the authorization of the City Council. The committee is expected to select the consultant in March or April of 2021. The selection committee will review and evaluate consultant qualifications and make a selection based on the following criteria:

1. Consultant Qualifications (experience with similar projects, ability to work with municipalities to attain desired outcomes, and knowledge of the topic) – 85%
 - a. Demonstrated ability to carry out all aspects of the project, as reflected in résumé and experience on similar projects.
 - b. Reasonable expectation that consultant can meet budget.
 - c. Availability/ability to work within time schedule.
 - d. Subjective review of prior work product.
 - e. Experience complying with public funding regulations and ability to work with grant requirements (see below).
 - f. Ability to work collaboratively with the Commission, City staff, and volunteers.

2. Quality, completeness, and clarity of submission – 15%

It must be noted that Criterion 1.b. (“Reasonable expectation that consultant can meet budget”) does not impose on the City any obligation to select the consultant on the basis of charging the lowest fee.

As part of the consultant-selection process taking place after the initial review of materials, one consultant or team (or possibly more) will be asked to submit a billing proposal and proposed scope of work.

Owing to the source of a portion of the project funding, qualifications required of the consultant include the following:

1. Comply with the provisions of 18 U.S.C. 1913.
2. Comply with Title VI of the Civil Rights Act of 1964, as amended. Section 504 of the Rehabilitation Act of 1973, as amended, the Americans with Disabilities Act of 1990, and the Age Discrimination Act of 1975 prohibiting discrimination on the grounds of race, color or national origin, against people with handicaps, and on the basis of disability and age.

3. Comply with all the requirements of Title 21 V.S.A. Chapter 5, Subchapter 6 relating to fair employment practices to the extent applicable, and Executive Order 11246, entitled "Equal Employment Opportunity," as amended by Executive Order 11375, and as supplemented in Department of Labor regulations (41 C.F.R. Part 60).
4. Comply with Federal requirements governing grants (OMB circulars A-87 or A-122, 43 CFR 12 or A-110, and A-128), as compiled at 2 C.F.R. 200, the Office of Management and Budget's Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards
5. Hold the City of Montpelier and the State of Vermont and its officers and employees harmless from any damages to persons or property arising from any act, omission, or action relating to this project.
6. Furnish periodic reports, statements, or other documents as necessary.
7. Promptly inform the City of any significant problems, or delays or adverse conditions.
8. Further, the final contract between the City and the chosen Consultant must incorporate all relevant terms required by the 2021 CLG Grant Manual, found here: <https://accd.vermont.gov/sites/accdnew/files/documents/HP/CLG%20Grant%20Manual%202021%20Grant%20Round.pdf>

X. RFP DECISION SCHEDULE

- A. Submittals must be received by 4:30 PM Friday, June 4, 2021. The City reserves the right to reject any proposals and/or modifications received after this time.
- B. Consultants selected for short-list—if applicable—by June 11, 2021.
- C. The City reserves the right to hold a special meeting of the HPC for interviews of finalists the third week of June 2021.
- D. Consultant selection estimated by June 30, 2021.

Questions about the project should be directed to Meredith Crandall at the above address or 802-262-6270, no later than 11:59 PM, Monday, May 24, 2021.

Following the selection process, one consultant/team will be selected to negotiate a final contract for services. The final scope of work with specified deliverables may be modified through negotiation of the final contract. Any expenses resulting from the interview, proposal, and contract process will be the sole responsibility of the consultant.

All submissions become the property of the City of Montpelier. The expense of preparing and submitting materials is the sole responsibility of the consultant. The City of Montpelier reserves the right to negotiate with any qualified source, or to cancel in part or in its entirety this solicitation as in the best interest of City of Montpelier. This solicitation in no way obligates the City of Montpelier to award a contract.

The City of Montpelier assumes no responsibility and no liability for costs incurred by consultant in responding to this solicitation, or in responding to any further request for interviews, additional data, etc. prior the issuance of a contract.