

Announcement

Borough of State College

Historic and Architectural Review Board Services

REQUEST FOR PROPOSALS

State College Borough, State College, Pennsylvania is soliciting Proposals from professional individuals and/or consulting firms for services to a) assist Borough Council (Council) in determining the scope of review of a potential Historic and Architectural Review Board (HARB) and b) assist staff in developing implementation materials for the establishment and operation of a HARB should Council choose to enact an ordinance. Initial services include workshops to educate Council, and community members, on what would be regulated with a HARB. If Council decides to continue with HARB creation, the chosen professional/consulting firm would continue services with Borough Planning Staff in order to create support training and materials for the enforcement of the ordinance.

These services include: preparing presentations, lectures and articles for multiple groups including elected and appointed officials, general public, professional organizations, and staff. Other services include: conducting historic structure surveys to determine housing styles and neighborhood character, materials research, products, and firms to better preserve Historic State College's buildings, and Historic District Design Guidelines for the Holmes Foster-Highlands Historic District and College Heights Historic District.

Information about the Borough of State College and the Planning Department is available on the Borough website at <http://www.statecollegepa.us> and information about the potential HARB can be found on the website at <http://www.statecollegepa.us/3004/HARB>.

Any change to the provisions or specification of this RFP shall be made by written addendum issued no later than four (4) working days prior to the RFP acceptance date. Prospective vendors shall have complete responsibility for being aware of any and all addenda.

All proposals must be received by **4:00 P.M. EST** at the Borough of State College on **Thursday, July 20, 2017. Proposals received after that date and time shall not be considered.** Interested parties must submit five (5) hard copies and one (1) electronic version of their responses on a flash drive. Submissions should be clearly labeled "**RFP Response: Historic and Architectural Review Board Services**" and delivered to the Planning Director – 2nd Floor, 243 South Allen Street, State College, PA 16801.

All correspondence concerning this RFP should be addressed to:

Ed LeClear, AICP

Planning & Community Development Director

elec clear@statecollegepa.us

(814) 234-7109

Introduction:

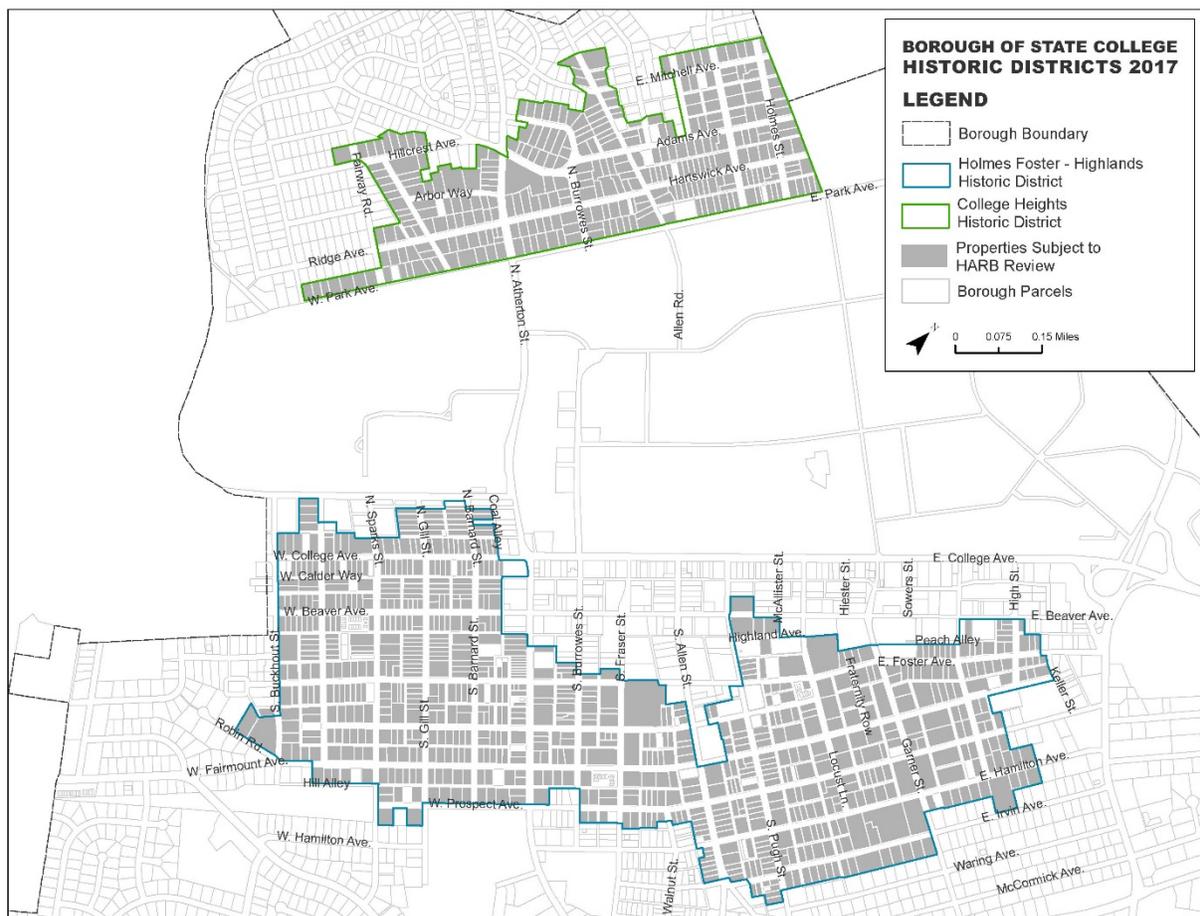
Purpose

The Borough of State College, acting through its Council and Design and Historic Review Board, is seeking consultant support to assist with implementation for a Historic and Architectural Review Board (HARB). On May 15, 2017, Borough Council (Council) directed Planning Staff to continue with the process of creating a HARB and provide a recommendation to Council on what is needed in order to move forward with a HARB. Due to Planning Staff's current work load, staff is recommending a consultant to be hired to educate Council on what exactly will be regulated with a HARB and then providing materials and education to the neighborhoods where the HARB will be in place.

If Council decides to continue with a creation of a HARB, the chosen professional/consultant will continue to work with Planning staff on a Local Historic District designation with the State of Pennsylvania and the establishment of a Historical and Architectural Review Board.

The Historic Districts

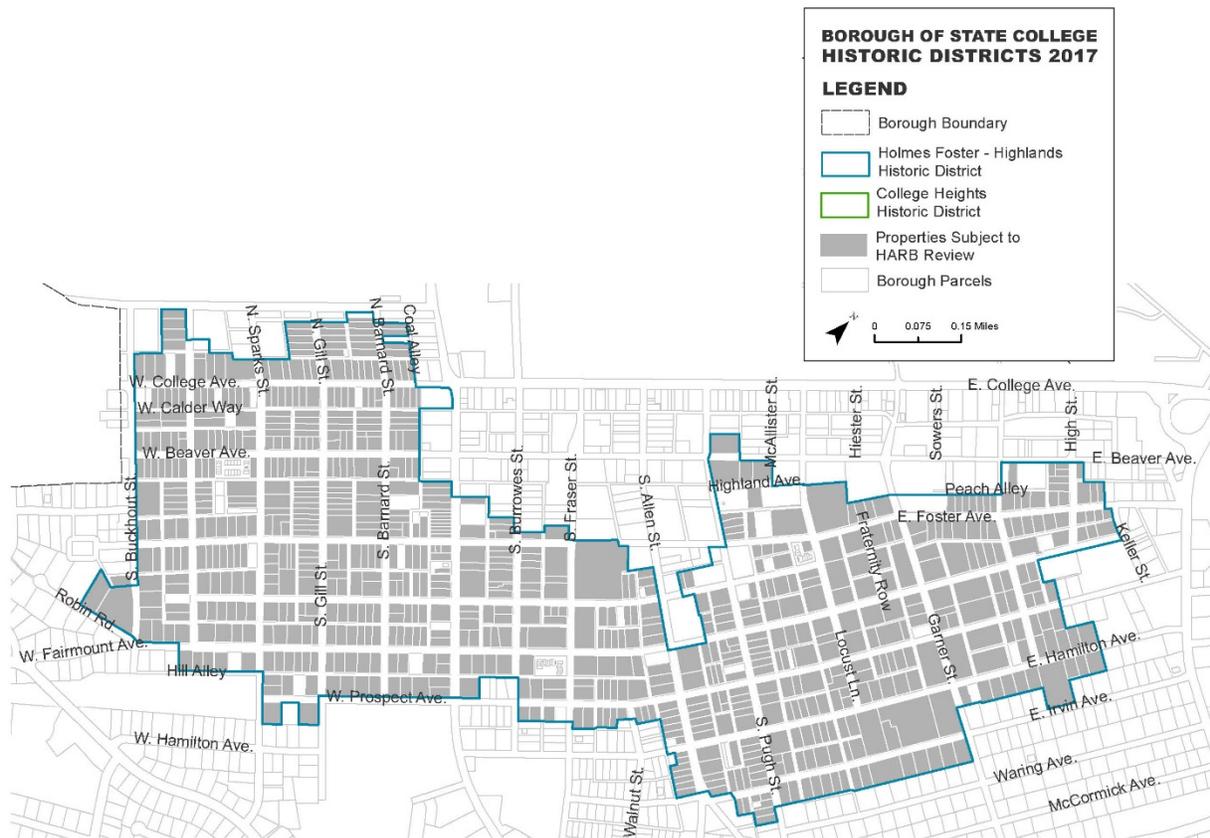
The Borough of State College has two National Registered Historic Districts, Holmes-Foster/Highlands Historic District and the College Heights Historic District. See map below.



Holmes-Foster/Highlands Historic District (see below)

The Holmes-Foster/Highlands Historic District is approximately a sixty-block area south of The Pennsylvania State University Ag Hill and Farmers High School historic Districts and south and west of State College's central business district. The Holmes-Foster/Highlands Historic District encompasses a major portion of the land and historic buildings associated with the residential history of State College as an emerging college town from its incorporation in 1896 to the beginning of World War II.

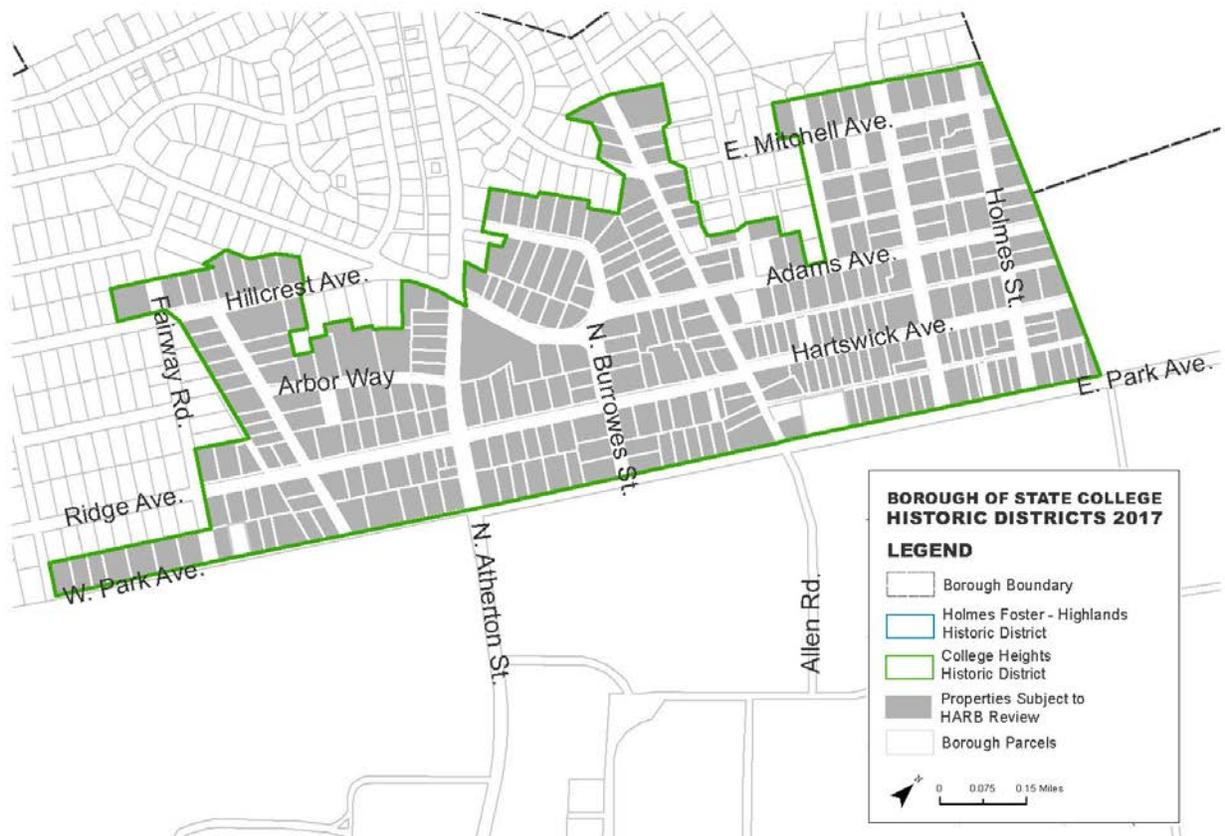
There are 727 contributing resources out of a total 858 structures in the Holmes-Foster/Highland Historic District, when it was nominated in 1995. Three houses date from the last half of the 19th century and are associated with farm properties upon which State College was developed. The remainder represent a rich sampler of early 20th century design and construction. The District includes vernacular Victorians, late Queen Annes, Mansard, Four Squares, and mansion-scale fraternity buildings. A supporting cast of architect-designed and mail-order houses are also present.



College Heights Historic District (see below)

The College Heights Historic District is located at the northernmost part of the Borough of State College. It is adjacent to and forms the northern edge of The Pennsylvania State University campus and its Ag Hill and Farmers High School historic districts. The College Heights Historic District encompasses land and historic buildings associated with the early residential history of State College and represents its growth and architectural development as an emerging college town.

There are 319 properties in the District; 278 of them are contributing resources. All but two, an elementary school and a service station, are residential. Architecturally these properties offer excellent examples of early 20th century housing styles—a combination of well-built mail-order, pattern book and architect-designed variations of Colonial and Tudor Revivals, Mission style, Craftsman Bungalow, Prairie School, and International style. A few of the earliest are vernacular Victorians and Queen Annes. Although variations in architectural styles and materials offer interesting contrasts, the scale and proportions of these properties are similar enough to provide a unity and cohesiveness to the neighborhood.



Proposal:

Scope of Work—The project will generally follow the scope listed below. The scope is comprised of three separate and distinct phases, each one with tasks that build off Council decisions.

Phase One: Startup, Council Review and Public Outreach

1. Review background materials, tour the study area and meet with staff for orientation
2. Conduct a set of study sessions with Council and the Design and Historic Review Board to review the set of reviewable items within the context of the standards set forth in the *Secretary of Interior's Standards for the Treatment of Historic Properties*.
3. Conduct community meetings to provide affected residents and property owners with information on the proposed district and solicit feedback. At a minimum, four community meetings will be held. One in each of the affected neighborhoods and one general forum.
4. Develop a summary document identifying areas of consensus, and differences, to assist Council in determining the scope of an acceptable ordinance.

If Council wishes to move forward with a local historic district ordinance after the results of Phase One, staff would issue a notice to proceed for Phase Two and subsequently, after adoption, Phase Three.

Phase Two: Develop Design Guidelines and Implementation Materials

1. Conduct structure surveys to determine housing styles and neighborhood character.
2. Perform material research, products, and firms to better preserve historic State College buildings.
3. Develop Historic District Design Guidelines to assist property owners in preparing work scope and submitting the Certificate of Appropriateness.
4. Prepare implementation materials for staff to provide to COA applicants.

Phase Three: Public Outreach

1. Conduct community workshop and presentations to property owners and appropriate Boards and Commissions and stakeholders (example: Realtors) on final content of the ordinance and process for project application and review.
2. Provide training and technical assistance services to assist staff in early implementation of the ordinance.

By structuring the scope of services in three phases, Council can move through an education and outreach process without any commitment to developing design guidelines or implementation materials. If, at the end of Phase One, Council chooses to move forward, Phase Two may then be authorized. If Council votes adopt an ordinance, staff would then initiate Phase Three of the contract.

Products/Deliverables—In their proposals, the consultant shall provide an outline of chapters to be included in the guidelines and standards document, along with a breakout of topics within each chapter in as much detail as possible. Generally, the chapters shall include introductory, body, and final sections, as well as applicable appendices. Topics shall include, but are not limited to: preservation theory, history of the Historic Districts and types of buildings within them, the Borough’s development review process in relation to the Districts and immediately adjacent areas, energy conservation and sustainability, treatments for historic properties, and guidance for new construction within and immediately adjacent to the Districts.

Meetings and Progress Reports—The professional individual/consulting firm agrees to provide the Borough Planning staff with monthly progress reports. The consultant also agrees to meet with Borough Planning staff prior to the start of the project, and as needed during the project. The professional individual/consulting firm further agrees to meet with Planning staff to discuss the methodology of the project, if needed. For Phase One, the professional individual/consulting firm agrees to **attend 2 public meetings**, to introduce the project and to discuss the results, and conduct **at least six community workshops**.

Schedule—The consultant will work with Borough staff to determine an acceptable schedule that meets the product milestones outlined in the scope of work. The proposed initial schedule is listed below:

- **June 30:** Issue RFP
- **July 20:** Responses with price quotations DUE
- **July 21:** Review responses
- **Week of July 24:** Contact interviewees
- **Week of July 31:** Interview, select consultant and negotiate contract
- **August 7th:** Council approves contract
- **Week of September 4th:** Council/DHRB workshops
- **Week of September 11th:** Community workshops
- **September 29:** Summary document DUE
- **October 9:** Discuss results at Council work session

Submittal Requirements

- The Borough’s intent is to choose the most qualified individual/firm based upon approach, methods, qualifications, experience, availability, and general cost estimate. Once an individual/ firm is selected, a detailed scope of services will be developed. Of prime importance is the individual’s/firm’s flexibility in responding to services as requested by Borough staff during the planning process.
- The final scope of services will identify a project schedule, tasks, deliverables, and expected expenditures by task. The scope will also indicate respective responsibilities of the consulting firm and Borough staff.

All respondent are required to include the following information in the submittal as a minimum.

1. **Methods and Approach**—Describe your expected or recommended approach and tasks. Describe the anticipated interaction with the Borough and the public. Provide an outline of your anticipated schedule for completing consultant tasks.
2. **Deliverables**—Provide a list and description of expected deliverables, tools, or other items that you will use to provide services and outcomes of your approach.

3. **Qualifications and Experience**—Provide relevant information regarding previous experience related to developing a similar project.
 - a. Names and location of similar projects
 - b. Name, address, and phone number of public agency references(s) overseeing the Design Guidelines and Standards effort.
 - c. Samples (preferably three via a web link or .pdf files) of work products for similar studies or projects. (Pennsylvania projects are preferred)
4. **List of Project Personnel**—This list should include the identification of the contact person with primary responsibility for this contract, the personnel proposed for this contract, and any supervisory personnel, including partners and/or subconsultants, and their individual area of responsibility. A resume for each professional and technical person assigned to the contract, including partners and/or consultants, shall be submitted. The resumes shall include at least three references from previous assignments.
5. **Organization Chart/Proposed Project Team**—An organization chart containing the names of all key personnel and subconsultants with titles and their specific task assignment for this contract shall be provided in this section.
6. **Availability**—Describe the availability of project personnel to participate in this project in the context of the professional individual/consultant firm's other commitments.
7. **Estimated Hours by Task**—Provide estimated hours for each proposed or optional task, including the time required for meetings, conference calls, etc.
8. **Schedule of Rates and Cost by Task**—Provide a schedule of rates and an anticipated costs of each task identified in the section "Scope of Work Considerations" or for tasks that are recommended as part of this planning effort. The response should clearly show the tasks broken down by the three Phases.
9. **Budget**—Provide a proposed budget for the project that shows effort by task and personnel, which include rates. The budget should clearly show time required for meetings and project management.
10. Evidence of Insurance-A Certificate of Insurance shall be submitted showing proof of Liability and Professional insurance coverages.

It is expected that this project will be a collaborative effort with the Borough. Borough Planning staff will be working closely with the successful respondent on all aspects of the study and in some cases leading elements of the study. Within your response please include how you would work with Borough Planning staff to conduct the study in an effort to save costs wherever possible.

Review and Assessment:

Proposers will be evaluated on the following criteria. These criteria will be the basis for review of the written proposals and any optional interview session. The rating scale shall be from 1 to 5, with 1 being a poor rating, 3 being an average rating, and 5 being an outstanding rating. The Borough reserves the right to award a contract to a vendor with a higher cost of services if the vendor ranks higher based on the review of the evaluation criteria herein.

WEIGHTING FACTOR	QUALIFICATION	STANDARD
2	Scope of Proposal	Does the proposal show an understanding of the project objective, methodology to be used and results that are desired from the project?
2	Assigned Personnel	Does the person who will be working on the project have the necessary skills? Are sufficient people of the requisite skills assigned to the project?
1	Availability	Can the work be completed in necessary time? Can the target start and completion dates be met? Are other qualified personnel available to assist in meeting the project schedule if required? Is the project team available to attend meetings as required by the Scope of Work?
1	Motivation	Is the firm interested and are they capable of doing the work in the required time frame?
2	Cost and Work Hours	Do the proposed cost and work hours compare favorably with the Project Manager's estimate? Are the work hours presented reasonable for the effort required in each project task or phase?
2	Firm Capability	Does the firm have the support capabilities the assigned personnel require? Has the firm done previous project of this type and scope?

State College Borough Staff

The Planning staff is primary support to the HARB. Staff will play an active role in the review of the RFP and be the staff representative throughout the RFP and creation process. The staff available at this time to support the HARB include:

Ed LeClear, AICP, Planning & Community Development Director

Ed LeClear joined the Planning Department in 2014. Prior to joining the Borough, Mr. LeClear was the Community Development Director at the Cumberland County Housing and Redevelopment Authorities. He also worked as a Community Planner for the Pennsylvania Department of Community & Economic Development and as Special Projects Coordinator for the Pennsylvania Downtown Center. He earned a B.A. from Miami University (OH), an M.S. in Urban Studies from Cleveland State University, and a Master of Regional Planning from Cornell University.

Anne D. Messner, AICP, Senior Planner/Zoning Officer

Anne Messner joined the Planning Department in 2007. Ms. Messner has a B.S in Geography from The Pennsylvania State University and an Urban Planning M.A. from University of Virginia. As a trailing spouse, Ms. Messner's previous experience includes Lancaster Borough Planning Commission, Cross County TMA, City of Fairfax and the Virginia Department of Transportation. In the Borough's Planning Department, Ms. Messner's role has become more significant over time to facilitate interpretation of the zoning and land development ordinance. This includes review and approval of land development plans which is authorized by the Borough's codification. In addition to this duty, Ms. Messner has been the Secretary to the Design and Historic Review Board. She is also often the staff representative for Zoning Hearing Board cases. The time that remains is focused on Planning Commission matters including but not limited to zoning changes and the Commission's Work Program.

Jenna Wargo, Planner

Jenna Wargo joined the Planning Department in 2016. Ms. Wargo has a B.F.A. in Communication Art & Design from the University of Louisville and a masters in Environmental Planning & Design from the University of Georgia. Ms. Wargo's background while studying at the University of Georgia was in historic preservation and maps/graphics. In the Borough's Planning Department, Ms. Wargo's roles consist of working with the Redevelopment Authority, Design and Historic Review Board, Sustainability Committee and maintaining and creating various maps and graphics for the Borough.

Denise Rhoads, Staff Assistant

Denise Rhoads joined the Planning Department in 2008. During this time, Ms. Rhoads has provided excellent support to the Planning Department. This includes, support not only to the numerous boards and commissions but she also plays a crucial role in the affordable housing program by updating and maintaining housing records to meet federal standards and audits.

APPENDIX A: Current Historic Districts

APPENDIX B: List of all properties located within the proposed HARB

APPENDIX C: State College National Register of Historic Districts for Holmes-Foster/Highlands and College Heights (1995 Nomination)

APPENDIX D: Photos of Holmes-Foster Highlands Historic District (1995 Nomination)

APPENDIX E: Proposed Historic and Architectural Review Board Ordinance