

Town of Sudbury
Historical Commission

REQUEST FOR QUOTES

Sudbury Historic Resource Inventory Survey

DATE OF ADVERTISEMENT:

Tuesday, August 1, 2023

SUBMISSIONS DUE:

Monday, August 28, 2023 at 10:00 AM
Late Submissions Will Be Rejected

DELIVER COMPLETED SUBMISSIONS TO:

Town of Sudbury
Planning and Community Development Department
278 Old Sudbury Road
Sudbury, MA 01776

For further information, please contact:

Beth Perry
Planning and Community Development Coordinator
PerryB@sudbury.ma.us

REQUEST FOR QUOTES

Sudbury Historic Resource Inventory Survey

The goal of this solicitation is to provide the best value of commodities and services to achieve the procurement goals of the Town of Sudbury (Town). The Town may negotiate a change in any element of contract performance or cost identified in the original request for the selected proposer or the selected proposer or contractor's response that results in a lower cost or more effective or better value than was presented in selected proposer or contractor's original response.

Costs not specifically identified in the Proposer's Response and accepted by the Town as part of a Contract, will not be compensated under any contract awarded pursuant to the Request for Quotes (RFQ). The Town will not be responsible for any costs or expenses incurred by Proposers responding to this RFQ.

The Town makes no guarantee any Commodities or Services will be purchased as a result of this solicitation.

The purpose of this solicitation is the selection of a qualified historic preservation consultant to provide professional research and documentation services to complete historic resource inventory survey meeting current Massachusetts Historical Commission standards.

I. INTRODUCTION

The Town of Sudbury (Town) is seeking responses from qualified historic preservation consultants to undertake surveys of historic resources in the Town of Sudbury and the production of inventory forms for selected historic resources. This Request for Quotes (RFQ) stipulates the procedures and requirements to be used by the Town in its selection for consulting services. The project will be divided into four phases, to be completed over approximately an eight-month period:

- ❖ PHASE I – Identification of documentary materials available for the project and development of methodology;
- ❖ PHASE II – Identification of historic resources to be surveyed, finalization of list of historic resources to be surveyed, and production of sample inventory forms;
- ❖ PHASE III – Production of complete draft inventory forms for review by the Sudbury Historical Commission;
- ❖ PHASE IV – Production of forty-one (41) final inventory forms, project summary report and map(s).

The Town will evaluate all timely responses to ensure all required submittals have been included in responses and that all responses meet the selection criteria. Proposals deemed to be complete shall be presented for review to a Selection Committee consisting of members of the Sudbury Historical Commission.

Proposers must provide fee amounts for each of these four tasks in their proposal. The Town has established a budget not to exceed \$23,000.

All submissions regarding this Request for Quotes must be received by the Town **no later than 10:00 AM on Monday, August 28, 2023** and addressed to the attention of Beth Perry, Coordinator of Planning and Community Development, Town of Sudbury. Submissions may be emailed to PerryB@sudbury.ma.us and, if emailed, must be marked “RFQ Historic Resource Inventory Survey” in the subject line. Submissions can also be faxed as well to 978-639-3314.

II. PROJECT AREA

The project area will include the Town of Sudbury, Massachusetts.

III. FUNDING SOURCE

The project is financed under a Town of Sudbury Community Preservation Act Fund for said purpose.

IV. PROJECT OBJECTIVES

See Attachment A for the complete Scope of Work.

Ongoing historic surveys play a key role in Sudbury’s ongoing town planning and preservation efforts and the continued inventorying of historic resources is an Action Matrix recommendation of the 2021 Sudbury Communitywide Historic Preservation Plan. This project furthers the Sudbury Historical Commission’s effort to identify and document the town’s historic resources.

Some of the current Sudbury Historic Resource Inventory forms were completed in the 1960’s and 1970’s by volunteers and are not up to current historic preservation survey standards. These resources need to be re-surveyed, especially those which are the most historically significant and potentially National Register eligible. Some of the under-surveyed resources fall within current historic districts, while other resources located outside of current historic district boundaries have not been surveyed at all.

This survey project will focus on presently under and undocumented historic resources including those facing development pressure, and potential full and partial demolition. The Sudbury Historical Commission (SHC) has identified a target list of historic resources in need of documentation. See the **Exhibit I** survey target list of forty (40) historic resources and one (1) area in need of documentation the SHC has developed which includes resources the 2021 Historic Property Survey Final Report recommended be surveyed.

V. SUBMISSION REQUIREMENTS: QUALIFICATIONS

Please note: any proposal that fails to include all of the information noted below – or is submitted by a person or persons who do not meet the qualifications outlined in Section V.B. below – will be rejected as unresponsive and will not be afforded a complete review by the Selection Committee.

Five (5) copies of the submission and one (1) electronic copy must be furnished to the Planning and Community Development Department for review by the Selection Committee. The overall proposal must include:

A. The identity of the individual, partnership, or corporation applying for contract award, credentials of the personnel who would actually perform the work, as well as their managers, and the nature of the supervision. State the responsibilities of each of the project personnel. If the consultant intends to sub-contract the photography or any other work required in the scope of services, the sub-contractor must be

identified. Sample work products are required for all personnel. This item is a major determinant in assessing the proposer's qualifications and will be incorporated as a condition in the contract to be awarded.

B. A proposer's qualifications statement, including professional qualifications and work experience attesting to capacity to perform the required work program. Include resume(s), detailing academic and professional work experience attesting to capacity to perform the required work program. Resumes are required for all project personnel. Proposers must meet the following minimum criteria:

1. Bachelor's Degree in Historic Preservation, Architectural History, History, Art History, or a closely related field and at least two (2) years full-time experience in an area relevant to the project; or
2. Master's Degree in Historic Preservation, Architectural History, History, Art History, or a closely related field.

C. A detailed explanation of the proposer's approach to this project: methodology, demonstrated understanding of the scope of work and completion deadline, and the proposer's expectations of assistance and services from the Town. A technical work plan and project timeline for accomplishing the tasks described in the scope of services must be provided.

D. A client reference list, with names, addresses, telephone numbers, and e-mail addresses (if available) especially for clients for whom the proposer has performed similar services within the past five (5) years.

E. Sample work products for all personnel.

F. Any other information deemed relevant to the project, and which the proposer believes will further the competitiveness of the proposal.

G. Price Quotation Form, Quotation Signature Form, and Certificate of Vote of Corporation (see Attachments B, C, and D).

VI. SELECTION CRITERIA

A. **Quality and Depth of Project Experience.** The proposer's response demonstrates superior experience in providing services related to the Town's requirements. The response must demonstrate a wide depth of experience with similar projects (5 or more), and prior experience with municipally, privately, or MHC-funded not-to-exceed or fixed-fee contracts. Project work samples should be of outstanding quality in content and technical presentation.

B. Qualifications of the Proposer. The proposer's resume(s) demonstrates that proposer has superior training, educational background, and work experience appropriate to the project described herein and all key project personnel demonstrate professional experience well beyond the minimum requirements. Proposer shall provide a statement confirming that they will not exceed the budget provided in the RFQ and that they can complete the project within the agreed upon timeframe.

C. Desirability of Approach to the Project. The proposer's response demonstrates a superior approach to the subject material, an understanding of the local historic and cultural resource issues addressed by the project, and a clear analysis of the time required for each phase of the project. The response demonstrates a strong understanding of the history and development of local architectural forms in Massachusetts communities.

D. Overall Quality of Client References. References contacted spoke favorably of the work performed by the proposer and would use them again for a similar project. References confirmed that consultant had met schedule expectations and delivered an “on-time” project.

E. Completeness and Quality of Proposal. Response is complete, concise, informative, and highly detailed. Response reflects the proposer is able to perform in a superior manner acceptable to the Town. Selection Committee is completely convinced about the proposer’s ability to provide the level of services as required by the Town. Response demonstrates excellent communication and documentation skills.

VII. INTERVIEWS

After review of the technical proposals, the Selection Committee may, at its discretion, schedule interviews with any or all proposers for the purpose of further evaluation of their qualifications and ability to provide the required services.

VIII. BASIS OF AWARD

The Town will award a contract resulting from this solicitation to the responsible proposer whose offer meets the stated requirements for technical expertise, project experience, qualifications, project approach, client references, proposal quality, and price.

Quotes should be submitted on Attachment B – Price Quotation Form.

IX. PROJECT FEE

The Town has established a budget not to exceed \$23,000 for the Scope of Services described herein. Proposers must complete Attachment B – Price Quotation Form. Project fees must be provided for each of the four phases of work as described on the Form. Fees shown shall include all costs and expenses (including materials, copying, mileage, photography, etc.) necessary to complete the scope of services defined in Attachment A of this RFQ.

X. PROJECT SCHEDULE (see Attachment A for description of work components):

- ❖ PHASE I – Identification of documentary materials available for the project, development of methodology - November 15, 2023;
- ❖ PHASE II – Identification of historic resources to be surveyed, finalization of list of historic resources to be surveyed and production of sample inventory survey forms – January 12, 2024;
- ❖ PHASE III – Production of forty-one (41) completed draft inventory forms for review by the Sudbury Historical Commission – March 23, 2024;
- ❖ PHASE IV – Production of forty-one (41) final inventory survey forms, project summary report and maps – May 17, 2024.

Please note: all contract work must be completed by May 17, 2024, unless an extension of time has previously been approved in writing by the Sudbury Historical Commission.

XI. SUBMISSION

Responses will be received at the Planning and Community Development Department, Town of Sudbury, MA until Monday, August 28, 2023 at 10:00 AM. Responses received after that date and time will be rejected. **The mailing address for all deliveries and walk-in service is:**

**Town of Sudbury
Planning and Community Development Department
278 Old Sudbury Road
Sudbury, MA 01776**

Please note that Town Offices' Summer Hours are:

Monday, Wednesday, and Thursday: 8:00 AM to 5:00 PM

Tuesday: 8:00 AM to 7:00 PM

Friday: CLOSED

XII. OTHER REQUIREMENTS

Insurance. The Contractor shall maintain insurance in the amounts set forth below and shall name the Town as an additional insured with regard to liability coverage. Certification of said insurance coverage shall be forwarded to the Town prior to commencement of the work.

General Liability: \$1,000,000 Bodily Injury and Property Damage Liability, Combined Single Limit with a \$2,000,000 Annual Aggregate Limit.

Motor Vehicle Liability: At least \$100,000 per occurrence and \$300,000 aggregate.

The Town shall be named as an Additional Insured on the liability policies and the Contractor shall furnish proof of such insurance coverage to the Town at the time of execution of the contract.

SCOPE OF WORK

Town of Sudbury Historic Resource Inventory Survey

PROJECT OBJECTIVES

The purpose of this project is to undertake the survey of cultural and architectural resources in the Town of Sudbury. The project will be structured to provide professional cultural and architectural resource survey expertise to the community. Exhibit I is the targeted list of properties to be surveyed and is attached to and incorporated within this scope of work. Specific project goals are as follows:

- 1) To assess and document forty-one (41) selected cultural and architectural resources, following Massachusetts Historical Commission (MHC) survey standards and methodology,
- 2) To apply the National Register criteria to all resources identified in the survey,
- 3) To submit to MHC a list of individual historic resources and/or districts that are recommended for nomination to the National Register of Historic Places.

METHODOLOGY

The Analytical Framework

The survey project must incorporate Massachusetts Historical Commission (MHC) criteria and methodology standards, to current standards. (See MHC's *Historic Properties Survey Manual: Guidelines for the Identification of Historic and Archaeological Resources in Massachusetts* (1992), *Survey Technical Bulletin #1* (1993), *MHC Interim Survey Guidelines* (March 1999. et seq.), *MHC Interim Guidelines for Inventory Form Photographs* (2009), and MHC's *Interim Guidelines for Inventory Form Locational Information* (2016). Both MHC survey guidelines and the tasks and products of the survey Scope of Work meet the U.S. Secretary of the Interior's *Standards and Guidelines for Identification* (1983).

Phase Meetings

The project consists of four phases. Project personnel consisting of the consultant, the Sudbury Historical Commission Lead Project Coordinator (LPC), and the SHC Chair, will participate in conference calls, virtual meetings, or at an agreed upon meeting location for a start-up meeting prior to the beginning of Phase I and to review project progress at the end of each phase. Work to be carried out during each phase and products due at the end of each phase, are described below. **No phase meeting will be scheduled until all work for that phase has been completed and submitted for review.** The work to be carried out during each phase and products due at the end of each phase are described below. The project is anticipated to begin on or about September 25, 2023.

The Inventory

See Exhibit I proposed target survey list of forty (40) historic resources and one (1) area the SHC has developed which include recommendations from the 2021 Historic Resources Survey Final Report.

MHC individual building and area inventory forms, maps, and National Register recommendations will be completed and submitted to MHC in accordance with the survey guidelines set forth in the MHC's *Historic Properties Survey Manual: Guidelines for the Identification of Historic and Archaeological Resources in Massachusetts* (1992) and *Survey Technical Bulletin #1* (1993), *MHC Interim Survey Guidelines* (March 1999 et seq.), and *MHC Interim Guidelines for Inventory Form Photographs* (2009), *MHC Interim Guidelines for Inventory Form Locational Information* (1983, copies available from MHC). These publications and memoranda are all incorporated into this document by reference.

The work to be carried out during each phase, and products due at the end of each phase, are described on the following pages.

SCOPE OF WORK

Phase I (8 weeks)

Tasks:

- (Start-up meeting.) Meet with SHC Lead Project Coordinator and SHC Chair to discuss the scope and inventory methodology of the project, assess available online documentary materials and other collections accessible by consultants (LHC files, local and regional libraries and archives collections, etc.), select maps, including a working map and large-scale base map (assessor's parcel map is preferred), to identify properties.
- Determine availability of electronic mapping and parcel data, and of town-based GIS data suitable for use in the project.
- Review existing inventory forms on file at both Sudbury Historical Commission and at MHC (including MACRIS database).
- Conduct initial research and reconnaissance survey to verify type and geographical distribution of historic resources.
- Meet with SHC Lead Project Coordinator and SHC Chair to discuss and review Phase I products and discuss outstanding issues related to determination of the finalized of survey list of forty (40) properties and one (1) area.

Products:

- Working map(s) and one large scale base map(s) to be used to identify inventoried historic resources.
- Methodology statement, specifying:
 - a. Survey objectives;
 - b. Criteria for selecting historic resources to be surveyed;
 - c. Procedures to be followed in conducting the survey and forms of products to be created;

- d. An assessment of existing documentation;
- e. A brief description of the amount and kinds of information to be gathered about the historic resources;
- f. Bibliography, including identification of web-based resources to be used in the project.

Phase I is to be completed by Wednesday, November 15, 2023.

Phase II (8 weeks)

Tasks:

- Conduct continued architectural assessments and documentary research to identify important historical themes, events, and persons for the survey list of historic resources, with particular attention to substantially synthesizing and supplementing the information already available. Research collections, should include relevant local, regional and state library and archive collections, as well as web-based research sites.
- Prepare finalized list of forty (40) properties and one (1) area to be surveyed.
- Complete representative draft inventory forms for resource type.
- Discuss and review the finalized survey list and draft inventory forms with SHC LPC and SHC Chair.

Products:

- Finalized list of historic properties to be surveyed, arranged alphabetically by street address.
- Representative draft inventory forms, to be submitted in both hard copy and MS Word format.

Phase II Tasks and products are to be completed by Friday, January 12, 2024.

Phase III (10 weeks)

Tasks:

- Conduct intensive research of historic properties and area selected for survey.
- Apply National Register criteria to historic properties.
- Prepare draft list of all historic resources recommended for National Register nomination.
- Prepare inventory forms with color photographs and location map(s). Forms for any surveyed resources listed in the State Register of Historic Places must be marked on the top front with appropriate designation code and date.
- Submit draft inventory forms with color photographs, draft National Register contexts, and National Register recommendations to SHC for review and comment (comments to be incorporated during Phase IV.)
- In consultation with SHC and MHC survey and MACRIS staff, develop lettering and numbering for those inventoried properties that do not have a prior assigned MHC lettering/numbering designation.

- Discuss and review the draft inventory forms and National Register Nomination recommendations with the SHC LPC and SHC Chair.

Products:

- Unnumbered complete draft inventory forms for forty (40) buildings and one (1) area with color photos and locus maps for all areas, buildings, sites, structures, and parks/landscapes. (This information may optionally be submitted in electronic form (CD or DVD) only for this project phase.)
- Draft list of resources recommended for National Register nomination.

Phase III tasks and products are to be completed by March 23, 2024.

Phase IV (8 weeks)

Task:

- Add inventory letters/numbers to forms if these were not added in Phase III.
- Name MS Word files to conform with MHC file-naming convention.
- Complete National Register Recommendation Statements to be attached to appropriate inventory forms.
- Prepare base map(s) identifying surveyed historic resources.
- Prepare street index of inventoried buildings and area.

Final Products:

- Hard-copy numbered MHC inventory forms (with continuation sheets of National Register of Historic Places Criteria Statement Forms) for (41) historic resources which includes one area (two sets with original color photographic Prints: one MHC and one for the SHC. Inventory forms must be printed single-sided on 24 lb. bond paper of at least 25% cotton fiber content. Photographs must be 3 1/2" x 5 1/2" or 4" x 6" digitally produced ink jet prints using MHC approved Printer/paper/ink combinations that produce prints with a minimum 75-year permanence rating. (The paper inventory forms should incorporate the electronic version photographs(s) in addition to an attached photographic print. Only one archivally-permanent paper print of the primary view, is required for most inventory forms, clipped - not stapled - to each form.)
- Large-scale base map(s) with all inventoried historic resources identified by inventory number (two sets: one for the SHC and one for MHC).
- Survey Summary Report: four *paginated, unbound, single-side* copies (two for SHC, two for MHC) which will include the following sections:
 - Abstract;
 - Methodology Statement, including survey objectives, research, survey procedures, and a description of products and accomplishments;

- Street index of inventoried resources arranged alphabetically by street name and MHC inventory form type. Property name (if any) and inventory number also will be included on the list;
- List of recommendations (if any) for historic resources to be nominated to the National Register of Historic Places; and
- Bibliography.
- CD containing an MS Word file for each inventory form. Each Word file should conform to MHC file name naming convention, and incorporate photograph(s) and map(s).
- A separate CD containing high-resolution TIF or JPG images for surveyed properties, identified by street address or MACRIS number, following MHC file naming convention for photographic images. Digital images must be a minimum of 1.0 megapixels in resolution.

Phase IV is to be completed and submitted to the SHC by Friday, May 17, 2024.

**Town of Sudbury
Planning and Community Development Department
278 Old Sudbury Road
Sudbury, MA 01776**

Historic Resource Inventory Survey

PRICE QUOTATION FORM

The undersigned hereby submits this price quotation to perform the services outlined in the Request for Quotes for the Town of Sudbury Historic Properties Inventory Survey.

Proposer Signature: _____

(Print Name): _____

Address: _____

The Proposer hereby pledges to deliver the complete scope of services required, for the rates and charges shown below:

Cost to complete the project:

Phase I: _____

Phase II: _____

Phase III: _____

Phase IV: _____

TOTAL COST: _____

(Not to Exceed \$23,000)

Note: Five (5) copies of proposal are to be submitted.

**Town of Sudbury,
Planning and Community Development Department
278 Old Sudbury Road
Sudbury, MA 01776**

Historic Resource Inventory Survey

QUOTATION SIGNATURE FORM

The undersigned, hereafter called the Proposer, having fully familiarized him/herself with all the request for quotation documents, hereby agrees and declares:

1. That prices inserted in the Price Quotation cover all necessary expenses to fulfill the conditions of the contract within the time stated.
2. Pursuant to M.G.L. c. 62C, § 49A, the Proposer hereby certifies that the Proposer has filed all state tax returns and paid all state taxes required under law.
3. The undersigned certifies under penalties of perjury that this response has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity or group of individuals.

The following items are to be completed by the Proposer, if applicable:

Our Company is: A Corporation _____
 A Partnership _____
 Individually Owned _____

Individual/Company Name: _____

Social Security or Federal Identification Number: _____

Signature of Individual or Authorized Official: _____

Address: _____

Telephone Number: _____

E-mail _____

CERTIFICATE OF VOTE
OF CORPORATION
(if applicable)

Date: _____

I, _____, Clerk-Secretary of the corporation named in the foregoing Quotation,
certify that _____ who signed the said Quotation on behalf of
said corporation, was then the _____ of said corporation; that I know his
signature; (Title)

and that his signature thereto is genuine and that said Quotation was duly executed on

_____, 2023.

(Clerk-Secretary)

Date of Incorporation: _____

(Corporate Seal)

Exhibit I
Sudbury Historical Commission
Historic Resource Inventory Survey

Proposed Target Inventory Survey List

1. 348 Boston Post Road – John Allen – Abraham Woods House c1720 SUD.17
2. 587 Boston Post Road – Bungalow
3. 610 Boston Post Road
4. 5 Candlewood Circle
5. 68 Concord Road – c1900 SUD.385
6. 89 Concord Road – Luman Frost-Alice Howe House c1903 SUD.387
7. 269 Concord Road – Barn of Jonas Tower House (Pennymeadow)
8. 277 Concord Road c1789 (old survey) SUD.96
9. 285 Concord Road – Spiller House (old survey) SUD.200
10. 327 Concord Road – First Parish Church 1797 (old survey) SUD.101
11. 379 Concord Road – r1720 SUD.106
12. 427 Concord Road – Whitehall c1815 and barn (old survey) SUD.109
13. 509 Concord Road – Red Gambrel Cape
14. 667 Concord Road – Aaron Haynes/Pantry Brook Farm c1825 (outdated)SUD,115
15. Concord Road – Hearse House (old survey) SUD.97
16. Concord Road – 1716 Old Burying Place/Revolutionary Cemetery (update) SUD.805
17. 10 Garrison House Lane – c1850 SUD.309
18. 12 Garrison House Lane – c1780 SUD.310
19. Haynes at Pantry Road – Bowker Store c1910 (update) SUD.204
20. 18 Hudson Road – Thomas Stearns House c1830 (old survey) SUD.64
21. 38 King Philip Road - Gideon Richardson House 1800 (old survey) SUD.36
22. 48 King Philip Road – Bogle Sister’s House 1800 (old survey) SUD.35
23. 61 King Philip Road – NE Barn of Dakin-Hunt property SUD.265
24. 11 Lakewood Drive
25. 28 Maple Avenue - Colonial Revival c1917 SUD.369
26. 118 Nobscot Road – Barn with cupola of Brown - Smith House c1850 SUD.31
27. 250 Old Sudbury Road – Rev. Bigelow Parsonage 1773 (old survey) SUD.71
28. 288 Old Sudbury Road – Loring Parsonage c1710 (old survey) SUD.67
29. 299 Old Sudbury Road – Hosmer House c1780 (old survey) SUD.66
30. 107 Plympton Road
31. 10 Pokonoket Avenue – Bungalow 1925
32. 80 Raymond Road – Barn of Hunt Homestead SUD.27
33. 16 Raynor Road
34. 25 Raynor Road
35. 32 Raynor Road
36. 36 Raynor Road
37. 42 Raynor Road
38. 24 Tippling Rock Road

39. Wayside Inn Road - Longfellow's Wayside Inn – 1683 (old survey) SUD.4
40. 35 Willis Road - c1900

Proposed Area Survey

Wayside Inn Local Historic Districts I and II - update and expand area inventory form to include entire area of the 1973 National Register District boundaries and to “include a discussion of 20th-century residential development north and northeast of the Inn” (as recommended in the 2021 Historic Properties Survey Phase IV Final Report).