

Town of Sudbury, Massachusetts

## REQUEST FOR PROPOSALS

Sudbury Historic District Design Guidelines Update

DATE OF ADVERTISEMENT:

**July 23, 2024**

SUBMISSIONS DUE:

August 30, 2024 at 12:30 PM  
Late Submissions Will Be Rejected

DELIVER COMPLETED SUBMISSIONS TO:

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

For further information, please contact:

Beth Perry  
Department of Planning and Community Development  
Town of Sudbury  
PerryB@sudbury.ma.us

# REQUEST FOR PROPOSALS

## Sudbury Historic Districts Design Guidelines Update

### **I. Introduction**

The Town of Sudbury (“the Town”), acting through the Historic Districts Commission (HDC) and the Department of Planning and Community Development (DPCD), seeks to engage a qualified professional Consultant or consulting team (“the Consultant”) to expand and update the current Historic Districts Commission’s General and Specific Guidelines (“Guidelines”).

The goal of the project is to: (1) review and recommend adjustments to the current Guidelines incorporating best practices for historic preservation practices from similar towns across the Commonwealth and New England; (2) create a user-friendly document, in keeping with the Secretary of the Interior’s Standards for the Treatment of Historic Properties, that can be easily interpreted and understood by historic property owners, Town staff, policy makers, and the public alike. The document should be highly customized to Sudbury and include substantial content covering the design and architecture present in each historic district.

### **II. Background**

Sudbury is a community where historic, cultural, and natural resources are valued, preserved, and enhanced as central to the Town’s character and quality of life. In 1963, Sudbury became one of the first towns in the Commonwealth to establish Local Historic Districts with the intent to preserve the architectural integrity of Sudbury’s most historically significant properties. Overseen by the Historic Districts Commission, the Town currently has five local historic districts – The Town Center Historic District, The Wayside Inn Districts I and II, the King Philip District and the George Pitts Tavern District – encompassing over 350 individual properties dating from the 18th century to present day. Following the criteria set forth under Chapter 40 of the Acts of 1963 (amended 2005), the Historic District Commission reviews all proposed alterations within the districts visible from the public right of way.

The HDC Guidelines serve as the primary resource for property owners undertaking reconstruction, rehabilitation, or restoration in the historic districts. These Guidelines also serve as the basis for the review process and provide a stronger, more concise foundation for decision making by the Commission. Applications in the districts range in complexity from small repairs, to installation of green technology and exterior mechanical systems, minor and major additions, to new construction. More robust Guidelines will better assist the preservation of historic properties and offer clear direction on how to incorporate renovations, new building technologies, and new construction in a historically sensitive manner.

The Guidelines will also be used by other municipal review boards, staff engaged in management of municipally-owned historic properties, and private owners of historic properties outside of the districts. The most recent Sudbury Master Plan, adopted in 2021, recommended the creation of a more descriptive and informative Historic Districts Design Guidelines as short-term action item.

This action item was also strongly supported by the Sudbury Historic Preservation Plan, adopted in 2022. Funding for professional Guidelines was approved by the Community Preservation Commission and by Town Meeting in 2022.

### **III. Scope of Services**

The Consultant selected for the project will be responsible for providing production services, including research, content development, photography, writing/editing, graphic design, and electronic formatting. The final product will be a user-friendly, electronic handbook, which will expand upon and illustrate the existing written General and Specific Guidelines currently in use. It is expected that the updated Guidelines will clearly communicate design principles and guidance to help applicants meet the standards used by the HDC in awarding Certificates of Appropriateness and create a more predictable approval process.

The process for updating the Guidelines will largely involve the HDC, the DPCD, and the Consultant. The Consultant, with the assistance of the HDC and DPCD, will also solicit input from Town departments and boards that make use of the Guidelines (including but not limited to the Planning Board and the Historical Commission), and include public outreach and education through public meetings with property owners, stakeholders, and other interested members of the community.

The Consultant will develop content based on existing documents, successful examples from other communities, working sessions with the HDC and DPCD, and input from public meetings.

It is anticipated that project will consist of work as follows:

- A. The Consultant will be expected to work closely with the HDC and town staff on the development of the Guidelines. The Consultant will be expected to recommend revisions to the existing Guidelines with best practices from similar-sized towns across the Commonwealth and New England.
  1. The text of the current Guidelines will be reviewed, and the Consultant will consult with HDC members and Town staff to understand the efficacy of the current Guidelines and areas for improvement or inclusion.
  2. The Consultant will conduct outreach to the community and necessary stakeholders regarding the efficacy of the current Guidelines and solicit suggestions for improvements. These meetings will serve to understand community concerns and solicit feedback for the draft Guidelines.
  3. The Consultant will work with HDC members and Town staff to explore possible revisions to the Guidelines and create a draft outline to be approved by the HDC.
  4. The Consultant is expected to participate in Historic Districts Commission and other meetings, as necessary, to make presentations and answer questions.

5. The Consultant will ultimately present the revised Guidelines to the HDC for approval.
- B. The Consultant will be expected to revise, update, and expand the existing Guidelines into an easy-to-use handbook format to be posted online. The revised Guidelines shall include the following:
1. Introductory information including: table of contents, district identification information (district location, boundaries, etc.), and an executive summary (acknowledgements, explanation of the role of historic districts, purpose of Guidelines, and how to use the manual).
  2. Explanation of the role of the Historic Districts Commission, the Certificate of Appropriateness application and review process, application forms, and other procedures or regulations, as applicable.
  3. A brief history of each historic district, including its historical development, significant properties, and designated period of significance.
  4. Identification of the character-defining features of Sudbury's architectural styles, including but not limited to: building types and styles, building materials, features, and details, landscape features, and streetscape features. Identification should include photographs of representative examples taken from each district.
  5. Guidelines for treatment of historic properties and cultural landscapes including but not limited to: maintenance, alterations, additions, and the appropriate treatment of historic fabric.
  6. Guidelines for reviewing and incorporating green technology, renewable energy sources, and alternative building materials into historic buildings.
  7. Information regarding appropriate treatment of historic commercial properties, including guidance for the preservation, rehabilitation, and potential façade improvement and signage Guidelines.
  8. Clear, detailed Guidelines for additions new construction in historic districts, including but not limited to: acceptable locations, siting, orientation, setbacks, size, height, relationship to existing buildings, materials, and design of various features such as fenestration, roofs, etc. While new construction should be compatible with and complement existing historic resources, it does not need, nor should it, aim to replicate existing buildings or character-defining features.
  9. Guidelines for demolition, neglect of properties, and relocating buildings.
  10. Guidelines for landscape plans and construction activities including but not limited to: streetscape improvements, utilities, significant cultural landscape features and their preservation, fences, retaining walls, parking, paving materials, driveways, and

lot sizes.

11. Guidelines for review of contributing, but non-historic buildings within historic districts.
  12. Information on the appropriate maintenance of historic buildings and conservation of historic materials. The Guidelines should describe common issues affecting historic materials and appropriate means and methods for their care and repair. Discussion of thoughtful design changes to address the effects of climate change on historic buildings should also be included.
  13. 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, applicable forms and applications, lists of available resources with contact information, and a comprehensive bibliography.
- C. The Guidelines should be highly illustrative and include professional renderings and diagrams to explicate content, including but not limited to: building types and styles, character-defining features, landscape features, appropriate alterations and additions, appropriate new construction, dos and don'ts, and other content. In addition, current photographs from each historic district shall be used to support Guidelines and illustrations.
- D. The Consultant, with the HDC and DPCD, will organize and facilitate a community outreach meeting in which all residents of a historic district, and any other interested Sudbury residents, are invited to attend and participate to provide response and feedback on the proposed Guidelines.
- E. The Consultant shall expect several rounds of revisions, in which HDC members and Town staff are presented with a draft deliverable. Following each deliverable, a comment matrix or track changes will be provided to the Consultant along with a follow-up meeting or call to answer any questions.
- F. All design objectives, Guidelines and recommendations produced and developed as part of the project will be in accordance with the Secretary of the Interior's Standards for the Treatment of Historic Properties with Guidelines for Preserving, Rehabilitating, Restoring, and Reconstructing Historic Buildings (36 C.F.R. 67 and 68).

### **III. Project Deliverables**

The Consultant will be responsible for providing expert advice throughout the project. The Consultant shall, at a minimum, provide the following deliverables to the Town:

- At least two hardcopies of all reports produced, along with high-quality electronic copies of the same;
- Electronic copies of all PowerPoint or other presentations used at public meetings identified above;

- Ten (10) bound hardcopies each of the approved Guidelines; and
- Two (2) flash drives with each of the following for Town staff files: high quality electronic copies of any photos and images used in the Guidelines; an unlocked copy of the final Guidelines in Microsoft Word; an unlocked file of the final Guidelines in the layout software used; and a high-quality pdf of the final Guidelines for posting online.

#### **IV. Project Schedule**

It is preferred that the Consultant complete their work within twenty-six (26) to thirty-four (34) weeks from the notice to proceed. However, each respondent must address the issue of project schedule in its response to this RFP and indicate if an alternative schedule is warranted and/or possible. During the project the deadline may be extended upon mutual agreement between the DPCD, the HDC, and the Consultant.

#### **V. Proposal Submission Requirements and Deadline**

- A. Letter of Transmittal – Should be signed by the individual authorized to negotiate for and contractually bind the proposer. The letter must state the offer is effective for at least sixty (60) days from the submission of the proposal or until it is formally withdrawn, or a contract is executed, or this RFP is cancelled. The proposal shall also disclose any potential conflict of interest.
- B. Qualifications – Describe the Consultant(s) and the proposer’s ability to successfully undertake the project technically, financially, and managerially. Include descriptions of similar work conducted elsewhere. If a team approach is proposed, indicate how the members have worked together on previous engagements.
- C. Methodology – Clearly describe the general work plan and methodology you would use to fulfill the Scope of Services. Include the range of outreach techniques to be utilized to engage the community.
- D. Staffing – Describe the Consultant(s) with the roles and responsibilities of each team member identified. Include capabilities of the proposed firm or individuals. Provide resumes and highlight staff members who will be directly involved in the project. Include experience in preparing community demographics, market needs assessments, and housing analysis.
- E. Project Timetable – The goal is to complete the Guidelines by June 30 2025.
- F. Deliverable – Assist in delivering the draft Guidelines update at a point in the project to be determined (but no later than February 1, 2025) and the final Guidelines at the completion of the contract. Consultant should also be available to meet with Town staff to review the draft as outlined in the Scope of Services.
- G. Additional Tasks – Identify any additional products, meetings, or recommendations that have not been specified in the Scope of Services but may be necessary to complete the project as defined.

H. Budget – The estimated overall project budget is to be no more than \$49,900. The budget should delineate the cost for each of the following:

- a) Personnel – Provide hourly rate for each individual who will work on the project.
- b) Deliverables – As outlined in your work plan.
- c) Travel Cost – If any.
- d) Administrative Costs – Copies of reports, photographs, presentation boards, etc.

I. References – The municipality/firm name, contact person, telephone number, and work description of all the projects for which the proposer has performed services similar to those described in the scope of work in the last five (5) years.

J. Submission Deadline – **Consultants must submit two (2) hard copies and one (1) digital (PDF) of the technical proposal, which shall include a price proposal, by:**

**August 30, 2024 at 12:30 PM** to the attention of Beth Perry, Department of Planning and Community Development, 278 Old Sudbury Road, Sudbury, MA 01776.

**Proposals that are faxed or late will not be accepted.**

The main envelope should be clearly marked PROPOSAL – Historic Districts Design Guidelines with CONSULTANT NAME: \_\_\_\_\_

Included in the main envelope should be the Price Proposal Form, any associated price proposal documents as noted in paragraph V. H., and all other requested materials (including the Certification of Non-Collusion and the Certification of Tax Compliance).

## **VI. Evaluation Criteria**

Each proposal will be evaluated on the following criteria. A Review Committee will determine whether the proposer’s response to a specific criterion is Highly Advantageous, Advantageous, Not Advantageous, or Unacceptable.

1. Number of years the proposer has been in operation,
2. Professional qualifications of staff who will work on the project (please include resumes of the project staff),
3. Experience in projects of similar size and scope (include the name of the entity, contact name, and telephone number for at least three (3) similar projects completed in the past five (5) years),
4. Ability to complete the previous project on budget and on time,
5. Commitment to complete this project in the specified time frame by providing information on your current work load,
6. Quality of proposal, and
7. References (must include all references which should be from individuals/firms/government entities that have hired the proposer for projects with a

similar size and scope as this project conducted during the last five (5) years).

## **VII. Rule for Award**

The Town of Sudbury will determine the most advantageous proposal from a responsible and responsive vendor by taking into consideration price and all evaluation criteria set forth in the RFP. A Review Committee will review and rank the proposals submitted in terms of their responses to the evaluation criteria. Then, the top two to four responses will be interviewed by telephone or Zoom. The Review Committee will then select a Consultant based upon all of the submitted information and the evaluation criteria.

The evaluation criteria are discussed in section V. Evaluation Criteria of the RFP.

The Town of Sudbury reserves the right to make any inquiries about the vendor to facilitate this process.

In these matters, the judgment of the Town will be binding, conclusive, and final.

Contract award will be made within sixty (60) calendar days after the date for receiving proposals. Proposals may not be withdrawn within that time except as provided by M.G.L. Chapter 30B.

## **VIII. Town's Right to Reject Proposals**

The Town of Sudbury reserves the right to reject any or all proposals if it is in the Town's interest to do so.

The Town may consider informal any proposal not prepared and submitted in accordance with the provisions hereof and may waive any informality or reject any and all bids, should the Town deem it to be in the Town's interest.

The Town may also reject proposals which in its sole judgment are incomplete, conditional, obscure, or not responsive or which contain additions not called for, erasures not properly initialed, or alterations or similar irregularities, or the Town may waive such omissions, conditions, or irregularities, if considered minor.



**CERTIFICATE OF NON-COLLUSION**

The undersigned certifies under the penalties of perjury that this proposal 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 undersigned, by submittal of this Proposal, agrees, should the undersigned become the successful proposer, to all of the terms of the RFP specifications and accepts these terms as incorporated in a contract with the Town.

\_\_\_\_\_  
Name of Person Signing Proposal

\_\_\_\_\_  
Title

\_\_\_\_\_  
Name of Business

Business Address: \_\_\_\_\_

City, State, and Zip Code: \_\_\_\_\_

Telephone Number: \_\_\_\_\_ Fax Number: \_\_\_\_\_

Email Address: \_\_\_\_\_

Date: \_\_\_\_\_

\_\_\_\_\_  
Signature

**CERTIFICATION OF TAX COMPLIANCE**

I certify, under the penalties of perjury, that the below mentioned firm or person, to my best knowledge and belief, has complied with all the laws of the Commonwealth relating to taxes.

NAME/FIRM: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_ DATE: \_\_\_\_\_

SIGNATURE OF AUTHORIZED OFFICIAL: \_\_\_\_\_

TITLE: \_\_\_\_\_

SOCIAL SECURITY or FEDERAL IDENTIFICATION #: \_\_\_\_\_

Approval of a contract, or other agreement, will not be granted unless the Applicant signs this certification form.

Your Social Security number or Federal Identification number will be furnished to the Massachusetts Department of Revenue (DOR) to determine whether you have met tax filing or tax payment obligations. The Town is required to furnish a list to the DOR at the end of its fiscal year, showing the vendors to whom more than \$5,000 is paid during the 12 months, ending June 30. Providers who fail to correct their non-filing or delinquency will not have a contract or other agreement issued, renewed, or extended. This request is made under the authority of Massachusetts General Laws, Chapter 62C, Section 49a.

**PRICE PROPOSAL FORM**

Base Bid:

State the Proposal Price in Numbers:

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State the Proposal Price in Words:

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Include a breakdown of itemized costs for each of the tasks as outlined in your work plan on a fixed fee basis. The budget should also delineate the cost for each of the following:

- Personnel – Provide the hourly rate for each individual who will work on the project.
- Deliverables – As outlined in your work plan.
- Travel Cost – If any.
- Administrative Costs – Copies of reports, photographs, presentation boards, etc.

NAME/FIRM: \_\_\_\_\_

ADDRESS:

\_\_\_\_\_  
\_\_\_\_\_

TELEPHONE: \_\_\_\_\_

EMAIL: \_\_\_\_\_

SIGNATURE OF AUTHORIZED OFFICIAL: \_\_\_\_\_

TITLE: \_\_\_\_\_ DATE: \_\_\_\_\_