



REQUEST FOR PROPOSALS (RFP) OFFICIAL NOTICE #12-2017

HERITAGE PRESERVATION PLAN: INVENTORY OF EXISTING AND POTENTIAL HISTORICAL SITES, PROPERTIES, DISTRICTS AND LEGACIES, AND AN ACTION PLAN FOR THEIR STEWARDSHIP AND CELEBRATION

Direct all replies to:

**Kathryn Kasper, Purchasing Agent
City of Racine Purchasing Department
730 Washington Ave., Room 105
Racine, Wisconsin 53403
Telephone: 262-636-9143
Fax: 262-636-9100**

Purchasing Web Site: <http://www.cityofracine.org/purchasing>

Complete Bid or Proposal packages may be downloaded at the above website. Vendors are responsible for checking this website for addenda prior to submitting a proposal. The City of Racine is not responsible for the content of any proposal package received through any 3rd party service. It is the sole responsibility of the vendor to ensure the completeness of the documents received from any 3rd party.

SEALED PROPOSALS MUST BE RECEIVED NO LATER THAN:

July 21, 2017 by 1:00 PM, CDT

PROPOSALS RECEIVED LATE WILL NOT BE CONSIDERED.

INTRODUCTION

The City of Racine Department of City Development, on behalf of the Racine Landmarks Preservation Commissions, is seeking proposals for professional consulting services from qualified historic preservation firm(s) or consultant(s) to prepare a historic preservation plan for the City of Racine.

Review of previous work to include the following:

- I. An analysis of commercial/industrial corridor plans, and neighborhood plans
- II. An analysis of the existing inventory listed in city, county, state, or national databases including: Architectural and Historical Survey of the City of Racine (1979), the State of Wisconsin Historical Society, the National Parks Service National Register of Historic Places
- III. An analysis of local, regional, state or national preservation efforts and historically significant properties, structures and sites not previously inventoried

The Heritage Preservation Plan will be a free standing document to be used by City Department, citizens, businesses and the City of Racine Landmarks Preservation Commission, but also adopted as an amendment to the document titled “A Comprehensive Plan for the City of Racine: 2035”.

The Department of City Development anticipates the total cost of these services not to exceed \$30,000.00.

PROJECT OUTCOMES

The purpose of the project is to prepare an action oriented preservation planning document that will provide an updated inventory of existing historic properties, districts, and potential heritage sites, update the inventory to include significant sites or contributing properties. The Heritage Preservation Plan shall be designed to improve and celebrate the preservation of historic and cultural resources in the City of Racine. Specific project objectives include:

- I. To identify issues, concerns and opportunities that affect the preservation of the City's historic and cultural resources;
- II. To assess the status of historic preservation in the community, including existing preservation mechanisms, and the integration of historic preservation goals and objectives in other aspects of the City of Racine's municipal departments;
- III. To identify priorities for preservation and develop an action plan for implementing priority preservation goals and objectives;
- IV. Foster communication, education and cooperation with and between existing groups engaged in preservation activities, including landmark property owners, general property owners and the public;
- V. Provide assessment and guidance in the promotion of heritage tourism opportunities.

SCOPE OF SERVICES

FINAL report should include the following recommendations:

- Future actions needed to address identified issues.
- Boundary amendments for National Register and Neighborhood Districts.
- New National Register or local historic districts. Provide maps of proposed districts.
- Insure the preservation of the cultural and historic heritage of the City.
- Potential economic impact potential of a well implemented heritage preservation plan .
- Outline short-term and long-term goals.
- Other recommendations which may arise as a result of the plan development process.
- An electronic copy of the final plan and a searchable database that can be used to create an online, interactive map of the City of Racine's Historic structures, sites, and cultural landmarks

Methodology

As part of the Heritage Preservation Plan process, the consultant will develop and a citizen participation plan that includes interviews with stakeholders, collaboration with existing historic and preservation organizations, and a method to gather general public input.

General Tasks for Districts and Neighborhoods

The analysis will identify buildings, objects, sites, and structures that may be architecturally and historically significant in the history, identity, and development of the City's many districts and neighborhoods. The analysis will suggest both representative and outstanding examples of the building forms, types, and styles present.

The analysis will provide additional detail in order to be able, at a later date, compile a list of contributing buildings and structures (and/or portions of buildings and structures) based on National Register criteria and local historic significance.

a. Proposed Meetings and reporting with the following:

- i. Individual BID boards
- ii. Landmarks Commission
- iii. Heritage Museum/Preservation Racine/ local stakeholders
- iv. City Development
- v. City MIS Dept. to ensure format compatibility
- vi. Department of Public Works
- vii. Other meetings whose necessity may become apparent during the plan development process.

b. Additional reconnaissance

- i. Interview members of the Landmark Preservation Commission, the Inter-department task force, Zoning Board of Appeals, Planning staff, parks department staff, and other relevant parties or relevant municipal organizations for insight into past practices, current status and future needs relating to historic preservation.
- ii. Assess the available documentary materials (existing inventory, historic maps, District Revitalization plans, Local Historic District Guidelines, local records, histories, Sanborn Maps, etc.).
- iii. Discuss and agree upon a methodology and criteria for determining significance within each District. Identify defining traits and features for selected era.

- iv. Review existing inventory and further identify the historic and/or architectural significance of buildings and structures, or portions thereof, by applying the National Register criteria and other criteria identified by the City;
- v. Create a list of individual buildings and structures, or portions thereof that may be significant to the preservation of said Districts; provide a rationale for inclusion.

Suggested Areas of Study

- Commercial Corridors including:
 - Downtown
 - RootWorks Area/ State Street
 - Uptown/Midtown
 - West Racine
 - Douglas Avenue / High Street
 - Lathrop Avenue and Durand Avenue
 - High Street
 - Others
- Wards 9, 12,13
- Industrial Districts
- Residential districts including:
 - Downtown/ Towerview
 - Uptown / Slausondale
 - Hickory Grove/ West Racine
 - Manree Park
 - Shorecrest
 - Kinzie Heights
 - Georgetown
 - Others
- Shopping Centers
 - Elmwood Plaza
 - Rapids Plaza
 - Shorecrest
 - Durand Plaza
 - Others
- Schools and Parks
- Notable Architects
- Others

Existing inventory

City-wide, substantial inventory and historic preservation work has been performed since the late 1970's. At this time, seven National Register Districts have been listed on the National Register. Additional inventory work and resource protection, however, is needed to continue the work of historic preservation. It is anticipated that this Heritage Preservation Plan will provide direction to this end.

Preliminary inventory work under this contract will identify commercial and industrial structures, architecture, and significant cultural heritage sites. The Heritage Preservation plan should include:

- **Existing inventory review, district/neighborhood criteria and new determinations**

- **Categorization of proposed properties and cultural sites into primary, secondary and contributing and/or local, state, national recognition**
- **Action items and next steps- Implementing the plan**

Resources available - Files and maps available at the City of Racine, Racine County Heritage Museum, and others that identify National Register Districts, UW-Parkside, Racine Public Library, Racine Business Center. Historic Districts and National Register properties will be shown on GIS maps.

Electronic database of all inventoried properties by map and parcel number, street address, inventory number, National Register Status, and location within the retail or neighborhood districts.

PROPOSAL

Copies required: Five bound copies and one (1) electronic copy on a flash drive.

Submissions must be in a sealed envelope labeled “Official Notice #12-2017” and shall include the Submitter’s company name and address. Failure to properly identify a submission according to these instructions may result in disqualification from consideration. In addition, the Respondent shall assume full responsibility for delivery of the Proposal to the City. Late submissions will not be accepted or considered.

Submission Requirements

The Evaluation Committee will reject proposals which do not meet the following certain minimum requirements or the instructions found in this document:

- Proven experience in providing similar services to public and private entities.
- The submittal must be from an established business, corporation, partnership, firm or individual(s) who normally furnish such services as the principal business for which the corporation or firm is formed
- A description of the business including a list of and number of employees is required.
- All proposals shall be submitted to the City of Racine Landmarks Preservation Commission as stated in the legal notice c/o Department of City Development. Each proposal shall be in SEALED envelopes, clearly marked on the outside of the envelope to indicate the contents, and the name and address of the respondents.
- The proposal must be received in the Department of City Development office before the deadline for receipt of proposals as stated above, and must be complete (must include and address all items specified in Proposal Submission Requirements section above).
- The proposal must be signed by an agent of the company who has authority to bind the company to a firm bid price.

The proposals should be organized into the following sections:

QUALIFICATIONS

1. Applicant qualifications’ statement, including academic and professional work experience attesting to capacity to perform the required work program.
2. Consultants must meet the following minimum criteria:
 - i. Bachelor's Degree in Historic Preservation, Architectural History, Historic Architecture, Historic Planning, or a closely related field and at least four years full time experience in an area relevant to the project; or (preferred) Master's Degree in Historic Preservation, Architectural History, Historic Architecture, Historic Planning

or a closely related field and at least three years full-time experience in an area relevant to the project.

3. A client reference list, with names, addresses, and telephone numbers, especially for clients for whom the consultant has performed similar services in the past.
4. Any other information deemed relevant to the project, and which the consultant believes will further the competitiveness of the proposal, including work samples from similar completed projects.
5. Qualified Historic Preservation or Archaeological Consultant listed with the Wisconsin Historical Society. Describe your experience working with the Wisconsin Historical Society, National Register survey methodology and criteria, and the Secretary of the Interior standards for historic preservation. Provide samples of or access to prior submissions to each.

PROJECT STAFFING

1. Respondents must set forth the staffing to be utilized for this service, including qualifications and experience. Resumes are required for all project personnel.
2. If the respondent is an individual who intends to do the entire work themselves without any additional staff, they must indicate the full extent and nature of any other projects or work they are currently engaged in during the time of the project work.
3. For multi-staff firms a list of individuals and their duties
4. Consultants must be prepared to contractually commit all individuals as submitted in their proposal, to this service. Any deviation from the proposed individuals will constitute a breach of agreement to any contractual agreement, which may result from this RFP.

PROJECT APPROACH

1. A description of the consultant's approach to this project: methodology, demonstrated understanding of the community's needs, and the consultant's expectations of assistance and services from the City of Racine.
2. Summarize how your firm would organize this project and what sets your approach apart from others'.
3. List the anticipated amount of support services and/or documents the City would be required to provide to you in the performance of these contracted services.

EVALUATION CRITERIA & PROCESS

The evaluation and selection process will consist of a review of proposals by the Landmark Preservation Committee. Qualifications for the project will be evaluated and ranked based on the following criteria:

Qualifications – XX%

Project staffing – XX%

Project Approach – XX%

Contract Negotiations

Once the City has selected a consultant based on the selection criteria rating and interview process, the City will negotiate a contract with the selected Respondent. If no agreement can be negotiated, the City may choose to negotiate with the next highest scoring respondent.

Any contract will not be considered executed unless approved by the City and signed by the City.

The City of Racine, the Racine Landmarks Preservation Commission, and the chosen consultant shall cooperate in maintaining good public relations throughout the period of this project. The Consultant must coordinate all activities necessary to promote public understanding, awareness and cooperation in conjunction with the entire project. An interview may be conducted with any respondent deemed Highly Advantageous or Advantageous during the evaluation of the proposals. Any proposer should make sure they are available during that time period for interviews outlined above.

RESPONSE DEADLINE & PROJECT TIMELINE

Copies required: Five bound copies and one (1) electronic copy on a flash drive.

Submissions must be in a sealed envelope labeled “Official Notice #12-2017” and shall include the Submitter’s company name and address. Failure to properly identify a submission according to these instructions may result in disqualification from consideration. In addition, the Respondent shall assume full responsibility for delivery of the Proposal to the City. Late submissions will not be accepted or considered.

The City anticipates the following schedule, which is subject to change.

July 6, 2017		Issuance of Request for Proposal (RFP)
July 14, 2017	4 p.m.	Deadline for Submission of Written Questions to the City
July 17, 2017		City Releases Responses to Questions
July 21, 2017	1 p.m.	RFP Submissions Due to City
August 2017		City Selects Finalists
August 7, 2017		Finalist Interviews
August 2017		Finalist selection
September 2017		Project begins
March 2018		Final draft presented

News Releases, Media Advisories and Media Interaction

The Respondent shall not discuss the RFP with any member of the media or issue news releases or media advisories pertaining to this request, or the work to which it relates, without prior expressed approval of the City. Should a member of the media or press contact the Respondent regarding this request, or the work to which it relates, the media or press should be referred to the City of Racine.

TERMS, CONDITIONS AND EXCEPTIONS

CONDITIONS AND AGREEMENTS

Right of Rejection: The City of Racine reserves the right to reject any or all qualifications, any portion of a qualification or to accept the qualification considered most advantageous to the City of Racine following final negotiations, evaluations and review.

Instructions to Vendors: Thoroughly examine the scope of work, schedule, instructions and all other solicitation documents. Make all investigations necessary to be familiar with conditions that affect the qualification, such as but not limited to, facilities for delivery of material and equipment. No pleas of ignorance by the respondents as a result of failure to investigate or examine conditions or failure to fulfill details of the contractual documents will be accepted as a basis for varying the requirements of the City or changing the compensation due.

By submission of a qualification: You certify that you are a duly qualified, capable, and otherwise bondable business entity. You affirm that any response has not included any preparation in collusion with any other respondent, and that the contents of any response as to prices, terms or conditions of said response have not been communicated in any manner to any other person engaged in this type of business prior to the official opening of this solicitation.

Contact Person: The City Purchasing Agent (or designee) shall act as the city representative in the issuance and administration of this RFQ and contract, and shall issue and receive all documents, notices, and correspondence pertaining to this RFQ. Such documents, notices, and correspondence not issued by or received by the City Purchasing Agent (or designee) shall be null and void. Any questions regarding this RFQ process must be submitted via e-mail to: Kathryn Kasper, Purchasing Agent kathryn.kasper@cityofracine.org, 262-636-9143.

No other employee or representative of the City of Racine is authorized to interpret any portion of this RFQ or give information as to the requirements of this Request for Qualifications in addition to that contained in or amended to this written RFQ document. Respondents are instructed not to contact any other city department or employee regarding this RFQ. Any unauthorized contact regarding this RFQ to any City employee or official may be cause for rejection of qualifications, at the sole discretion of the City.

Questions will be answered via e-mail within three working days. Final date for questions is listed in the Calendar of Events. Answers to questions from any respondent will be provided to all respondent on the vendor list. No verbal or written information, which is obtained other than through this Request for Qualifications or its addenda, shall be binding on the City of Racine. Vendors are expected to raise any questions, exceptions, or additions they have concerning this RFQ document as soon as possible during the process.

Errors or Omissions: If a vendor discovers any significant ambiguity, error, conflict, discrepancy, omission, or other deficiency in this qualification, the vendor should immediately notify the above named individual of such error and request modification or clarification of the RFQ document.

The City of Racine reserves the right to permit cure of, or waive any informality, any irregularities or technicalities contained in any qualification submitted, at the sole discretion of the City of Racine, provided such waiver does not substantially change the offer or provide a competitive advantage to any other vendor. Contracts will be awarded in the best interests of the City of Racine.

Specification Exceptions: Respondents are urged to review all RFQ documents, including the statement of work, specifications, requirements and evaluation process prior to submitting a response. If a

respondent has any objections to the statement of work, specifications, requirements or evaluation process they are urged to submit a written notification prior to the last day for questions as indicated in the Calendar of Events. By submitting a qualification the respondent is indicating their acceptance of the specifications, requirements and evaluation process and will have no standing to protest the specifications, requirements or evaluation process.

Addenda: Changes to this RFQ will be made only by formal, written addendum issued by the City of Racine's Purchasing Division. When possible, any such addendum will be electronically mailed to all known respondents, otherwise other transmittal arrangements will be made. Any and all addenda issued as part of this RFQ shall become part of the specifications of this RFQ and will be made part of the contract. It is the vendors' responsibility to check and assure receipt of any and all addendums.

Award of Contract: The City of Racine does not warrant or guarantee that a contract will be awarded as a result of this Request for Qualifications. If a contract is awarded as a result of this qualification, the award will be made to the low, responsive, responsible offer or whose qualification is most advantageous to the City of Racine, at the sole discretion of the City, by the issuance of a City of Racine purchase order or execution of a contract. The City reserves the right to reject any and all qualifications and to select the vendor considered by the City to be most advantageous.

Assignment and Subcontracting: The selected Contractor will not be permitted to sublet, sell, transfer, assign or otherwise dispose of the contract or any portion therein, or its right, title or interest in, to any person, firm or corporation without the written consent of the City of Racine, which will not be unreasonably withheld. All of the terms, conditions and provisions of this Contract, and any amendments thereto, shall insure to the benefit of and be binding upon the parties hereto, and their respective successors and assigns.

If the City of Racine permits the use of subcontractors, the following will apply:

The contractor is the prime vendor. A prime vendor is the vendor who provides a service and receives a payment for that service. The City considers the prime vendor to be the sole point of contact with regards to contractual matters, including the performance of the services and the payment of any and all charges resulting for contractual obligations.

The prime contractor will be responsible for the contract performance when subcontractors are used. However, when subcontractors are used, they must abide by all terms and conditions of the contract. If subcontractors are to be used, the contractor must clearly identify the subcontractor including length of time the subcontractor has been used by the prime contractor and other projects.

The prime contractor shall provide the City with the names of any subcontractors used for the performance of any part of this contract. The existence of the subcontractor does not relieve or reduce the prime contractor of any liability to the City for any breach in the performance of the prime contractor's duties. The prime contractor agrees that all subcontractors shall be agents of the prime contractor and the prime contractor agrees to hold harmless hereunder for any loss or damage of any kind occasioned by the acts of omissions of prime contractors, subcontracts, their agents or employees.

Vendor Responsibility: A response may be rejected if a respondent fails to meet any one of the following RFQs:

Financial and Organizational Capacity: Factors to be considered include, but are not limited to, assets, liabilities, recent bankruptcies, equipment, facilities, personnel resources and expertise, availability in consideration of other business commitments, or existence of appropriate accounting and auditing procedures for control of property and funds.

Legal Authority: Factors to be considered include authority to do business in the State of Wisconsin, licensing, debarment by the State of Wisconsin or Federal Government due to a prevailing wage violation, OSHA violations, violations of other local, state or Federal law, etc.

Integrity: Factors to be considered include, but are not limited to, criminal indictments or convictions, civil fines and injunctions imposed by governmental agencies, anti-trust investigations, ethical violations, tax delinquencies, debarment by federal, state or local governments, or prior determinations of integrity-related non-responsibility.

Previous Contract Performance: Factors to be considered may include reports of less than satisfactory performance, early contract termination for cause, contract abandonment, court determinations of breach of contract, etc.

INSURANCE & INDEMNIFICATION

The Contractor shall not commence work on contract until proof of insurance required has been provided to the applicable department before the contract or purchase order is considered for approval by the RDA.

It is hereby agreed and understood that the insurance required by the RDA is primary coverage and that any insurance or self-insurance maintained by the RDA, its elected and appointed officials, officers, employees, or authorized representatives or volunteers, and each of them, will not contribute to a loss. All insurance shall be in full force prior to commencing work and remain in force until the entire job is completed and the length of time that is specified, if any, in the Contractor listed below whichever is longer.

1. PROFESSIONAL LIABILITY

A. Limits

(1) \$1,000,000 each claim

(2) \$1,000,000 annual aggregate

B. Must continue coverage for 2 years after final acceptance for service/job.

2. GENERAL LIABILITY COVERAGE

A. Commercial General Liability

(1) \$1,000,000 each occurrence limit

(2) \$1,000,000 personal liability and advertising injury

(3) \$2,000,000 general aggregate

(4) \$2,000,000 products - completed operations aggregate

B. Claims made form of coverage is not acceptable.

C. Insurance must include:

- (1) Premises and Operations Liability
- (2) Contractual Liability
- (3) Personal Injury
- (4) Explosion, collapse and underground coverage
- (5) Products/Completed Operations must be carried for 2 years after acceptance of completed work
- (6) The general aggregate must apply separately to this project/location

3. BUSINESS AUTOMOBILE COVERAGE

A. \$1,000,000 combined single limit for Bodily Injury and Property Damage each accident

B. Must cover liability for Symbol #1 - "Any Auto" - including Owned, Non-Owned, and Hired Automobile Liability.

4. WORKERS COMPENSATION AND EMPLOYERS LIABILITY – As required by Wisconsin State Statute or any Workers Compensation Statutes of a different state.

A. Must carry coverage for Statutory Workers Compensation, and an Employers Liability limit of:

- (1) \$100,000 Each Accident
- (2) \$500,000 Disease Policy Limit
- (3) \$100,000 Disease - Each Employee

5. UMBRELLA LIABILITY – If exposure exists, provide coverage at least as broad as the underlying Commercial General Liability, Watercraft Liability (if required), Automobile Liability and Employers Liability, with a minimum limit of \$2,000,000 each occurrence and \$2,000,000 aggregate, and a maximum self-insured retention of \$10,000.

6. ADDITIONAL PROVISIONS

A. Primary and Non-contributory requirement - all insurance must be primary and noncontributory to any insurance or self-insurance carried by City of Racine.

B. Acceptability of Insurers - Insurance is to be placed with insurers that have an A. M. Best rating of no less than A- and a Financial Size Category of no less than Class VII, and who are authorized as an admitted insurance company in the state of Wisconsin.

C. Additional Insured Requirements - The following must be named as additional insureds on the General Liability and Business Automobile liability coverage arising out of project work:

The RDA, its elected and appointed officials, officers, employees, authorized representatives, and volunteers. On the Commercial General liability Policy, the additional insured coverage must be ISO form CG 20 10 0704 and also include Products - Completed Operations additional insured coverage per ISO form CG 20 37 07 04 or their equivalents for a minimum of 2 year after acceptance of work. This does not apply to Workers Compensation Policies.

D. Deductibles and Self-Insured Retentions - Any deductible or self-insured retention must be declared to and approved by the RDA.

E. Evidences of Insurance - Prior to execution of the agreement, the Contractor shall file with the RDA a certificate of insurance (Accord Form 25-S or equivalent) signed by the insurer's representative evidencing the coverage required by this agreement. In addition form CG 20 10 07 04 for ongoing work exposure and form CG 20 37 07 04 for products-completed operations exposure must also be provided or their equivalent.

PROPOSER'S CERTIFICATION

I hereby certify that all statements herein are made in behalf of:

Name of Corporation, Partnership or Person submitting proposal

a corporation organized and existing under the laws of the State of:

a partnership consisting of: _____

an individual trading as: _____

of the City of _____ State of _____

that I have examined and carefully prepared this proposal from the plans and specifications and have checked the same in detail before submitting this proposal; that I have full authority to make such statements and submit this proposal in its (their) behalf, and that said statements are true and correct

SIGNATURE: _____

TITLE: _____

Sworn and subscribed to before me

this _____ day of _____ 20 _____.

(Notary or other officer authorized to administer oaths)

SEAL:

My commission expires _____

INSTRUCTION TO PROPOSERS

The specifications shall be held to include the Advertisement, Instructions to Proposers, Manufacturer's Qualifications, General Conditions, Proposal, Contract and Specifications.

All proposals shall be made out as directed in the specifications and shall be on the Standard Proposal form if furnished by the RDA. Any bid not on this form will not be accepted. Failure to comply with these requirements may result in rejection of bidder's proposal. **Bids will be placed in a sealed envelope and marked with the words "OFFICIAL NOTICE #12-2017" Please return this entire bid package with your bid.**

Proposals are to be State and Federal Tax Exempt. A tax exemption certificate will be furnished to the successful bidder. No proposal may be withdrawn after the time for opening bids.

Payment for the work will be in cash upon completion and acceptance of the work unless otherwise specified. If monthly payments are made, they will be made as set forth in the contract.

The RDA reserves the right to reject any or all bids or to accept any bid considered most advantageous to the RDA. It also reserves the right to waive any informality in bids received whenever such waiver is in the best interest of the RDA.

The accompanying proposal includes the furnishing of all materials, labor and equipment required by the attached specifications, which I have carefully examined, and I hereby certify that the statements made herein are true and correct.

The undersigned represents that the prices in the accompanying proposal are neither directly or indirectly the result of an agreement with any other bidder.

COMPANY: _____

ADDRESS: _____

CITY, STATE: _____

SIGNATURE: _____

PRINTED NAME: _____