



REQUEST FOR PROPOSALS

**BOROUGH OF CARLISLE
HISTORIC DISTRICT SURVEY**

Issue Date: October 31, 2023
Response Deadline: November 30, 2023

Overview

The Borough of Carlisle seeks a consultant to perform an Inspection Level Survey that meets the Pennsylvania State Historic Preservation Office (PA-SHPO) standards for surveying and documenting architectural resources within the boundaries of the Carlisle Historic District (HDA and NR) and the Carlisle Historic District (NR) Eligible Expansion.

The requested survey boundaries are depicted in Exhibits 1-3 below:

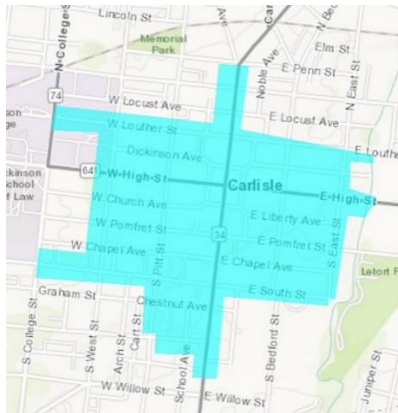


Exhibit 1: Carlisle Historic District (HDA)



Exhibit 2: Carlisle Historic District (National Register of Historic Places [NR])

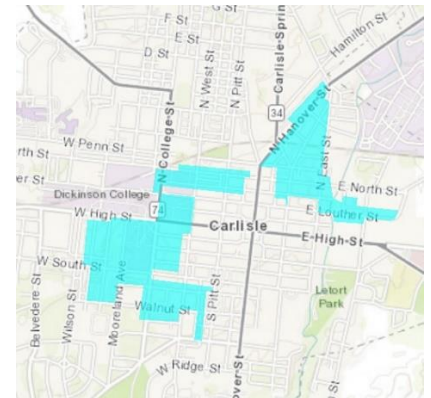


Exhibit 3: Carlisle Historic District (NR) Eligible Expansion

Businesses and residents of the Carlisle Historic District are located in the portion of the Borough which most strongly reflects its cultural, economic, social, political, and architectural history. The survey will provide updated resource information for the public and guide local decision makers to successfully plan for the future of Carlisle's Historic District. A final survey report shall include the minimum required information on each resource as defined by the PA-SHPO including but not limited to: architectural style, period(s) of construction, primary building materials, current high resolution digital photographs of the primary facades of each individual resource with spreadsheet index, a recommended designation as a contributing or non-contributing resource, GIS map(s), and shapefiles of parcels containing each individual resource and its associated data. All survey data will be provided to the Borough of Carlisle and uploaded to the PA-SHPO's resources database, PA-SHARE. GIS database format may be negotiated with Carlisle Borough staff in consultation with SHPO staff.

The target end date for this project is November 1, 2024. Cost estimates are not to exceed \$35,750. Proposals are due no later than 4:30 p.m. ET on Thursday, November 30, 2023.

Background

The Borough of Carlisle received Certified Local Government (CLG) grant funding in the amount of \$32,500 and will contribute a 10% local cash match of \$3,250. As a CLG community, *Borough of Carlisle Inspection Level Survey RFP*

Carlisle has pledged to plan for the historic character of the Borough. An examination of the available preservation planning tools revealed the need for updated historic resource inventories, exploring historic district boundaries for comprehensive planning, preservation training for HARB members, and public outreach/education efforts.

Additional information about Carlisle Borough can be found on its website, carlislepa.org.

Scope of Work

The Borough of Carlisle is looking for qualified individuals or entities to survey the Carlisle Historic District (HDA and NR) and the Carlisle Historic District (NR) Eligible Expansion. The survey must follow the PA-SHPO standards for an inspection level survey. The survey will be used for short- and long-range planning and architectural design review.

The following is the scope of work for the survey project and the anticipated time of completion:

- **Technical Expertise**

The Borough of Carlisle is interested in working with an architectural historian or a consultant team supervised by an architectural historian. Qualified individuals must meet the Secretary of the Interior Professional Qualifications Standards and have experience performing cultural resource surveys. The selected consultant must be trained in the PA-SHPO standards to perform an Inspection Level Survey of architectural resources within the Carlisle Historic District (HDA and NR) and the Carlisle Historic District (NR) Eligible Expansion.

The selected consultant will be required to prepare a contract for consulting services to the satisfaction of the Borough Solicitor. The Borough anticipates executing the contract with the selected consultant in mid-December 2023.

- **Meetings and Reports**

The consultant will meet with staff in the Department of Sustainable Community and Economic Planning (SCEP) each month to provide progress updates that will contribute to quarterly CLG grant reports to be submitted by Borough staff. Phone or videoconference monthly meetings will be encouraged for efficiency. All project deliverables will be provided to the Borough of Carlisle's SCEP Director.

- **Inspection Level Survey**

The consultant will conduct research on PA-SHPO and local repositories and prepare an inspection level survey plan per PA-SHPO standards (January 2024 – February 2024). The consultant will implement the inspection level survey plan to survey all identifiable cultural resources within the Carlisle Historic District (HDA and NR) and the Carlisle Historic District (NR) Eligible Expansion (March – June 2024).

Deliverables: 1) Draft Inspection Level Survey Plan 2) Final Survey Plan that meets PA-SHPO requirements 3) Survey and data collection methodology 4) Completed Survey Documentation

- **Data Processing, Reporting, and Mapping**

The Consultant will present the purpose and methodology of the Inspection Level Survey to

the Historic Architecture Review Board (HARB) (February 2024) and subsequently report and present all findings to HARB at the end of the project (November 2024). All survey information will be prepared and submitted to the PA-SHPO standards via PA-SHARE (March – May 2024). The consultant will prepare GIS shapefiles of surveyed architectural resources per PA-SHPO standards. All GIS files will be published to PA-SHARE and provided to the Borough of Carlisle (June – November 2024).

Deliverables: 1) PowerPoint (PPT) on purpose and methodology of the survey 2) PPT on the survey results 3) Survey data entry to PA-SHARE 4) Digital photos with spreadsheet index 5) GIS shapefiles and maps 6) Draft survey report 7) Final survey report

RFP Submission Guidelines and Requirements

Qualified firms shall submit their proposals electronically via email to Jared Woolston, Director of Sustainable Community and Economic Planning, jwoolston@carlislepa.org with the subject line "RFP – Historic Survey" no later than 4:30 pm, Thursday, November 30, 2023.

Proposals will become property of the Borough of Carlisle. No hardcopy proposals will be accepted. Contact with any Borough representatives, including, but not limited to, members of HARB and Borough Council, other than Jared Woolston is strictly prohibited and could result in the automatic rejection of the proposal.

The Borough will award a contract for a proposal that, in the Borough's sole discretion, that best addresses the Selection Criteria and most cost effectively satisfies the requirements of this solicitation. The Borough reserves the right to reject any or all proposals if, in its judgment, the best interest of the Borough will thereby be promoted; and to waive technical defects or other provisions of the proposal, if in its judgment, the interest of the Borough shall so require. The Borough reserves the right to negotiate specific details and modifications and to waive any requirement herein with the proposals submitted prior to entering into a contract.

The successful bidder/firm shall provide evidence of the following insurance coverages, which insurance shall be maintained by the successful bidder/firm during the time that services are provided to the Borough:

- Commercial General Liability insurance in the amount of \$1,000,000 per occurrence and \$3,000,000 in the aggregate. Workers' Compensation Insurance in statutory limits as required by Pennsylvania law.

Limit proposals to 3 pages and include the following:

1. Letter of interest.
2. Qualifications and experience: provide a description of the history, experience, and qualifications you have to perform the scope of work.
3. Approach to scope of work. Provide a detailed and deliverables-based description of your approach to each element of the scope of work. Be specific as to each element of your work plan.
4. Project Schedule. Provide a detailed timeline for all project deliverables/milestones.
5. Resumes or CVs of all project personnel should be attached to the proposal and will not count toward the proposal page limit.
6. Cost proposal. Provide detailed costs and a clear, itemized budget for the services to be performed based on the scope of services and deliverables.
7. A list of names, titles, and contact information for up to three references.
8. In addition to the contents of the proposal and not subject to the 3-page limit, provide either as attachments or by links to online material at least three relevant survey reports completed by you and your team.

Selection Criteria

The following criteria will be used to assess proposals:

- Quality of written proposal
- Completeness of proposal and responsiveness to RFP requirements
- Project description and approach
- Consultant's prior experience in conducting similar studies and assessments
- Consultant's training, expertise, and professional credentials
- Quality of references
- Reasonableness of cost proposal

RFP DISCLOSURES

The Borough is making this solicitation with the intention to award an agreement with a firm that will perform an Inspection Level Survey that meets the Pennsylvania State Historic Preservation Office (PA-SHPO) standards for surveying and documenting architectural resources within the boundaries of the Carlisle Historic District (HDA and NR) and the Carlisle Historic District (NR) Eligible Expansion.

Organizations responding to this RFP are doing so with full disclosure, understanding and acceptance of the following:

- The Borough reserves the right to reject any RFP in whole or part for any reason.
- The Borough may change the scope of work or selection process at its discretion at any time.
- Each bidder/firm agrees that if selected to provide services by the Borough the bidder/firm will be bound by the terms and requirements of this RFP and all documents and information submitted by the bidder/firm to the Borough in response to this RFP, which RFP, documents and information shall form a binding contract between the Borough and the bidder/firm.
- Approvals made by Borough Council with respect to this project are final.
- Unsuccessful consultants will not be provided with a debriefing session to discuss the deficiencies of their submission.
- Following award of the contract by Borough Council, all RFP submissions are considered public records that are subject to Pennsylvania's "Right to Know" laws. Materials considered confidential by the Consultant must be clearly identified and include a statement of why said records should not be considered public records. The Consultant at the Consultant's expense, and not the Borough, shall be responsible for asserting any confidentiality or proprietary claim or any other exception to providing records as a result of a Right-to-Know request, an appeal before the Office of Open Records or any appeal of a decision from the Office of Open Records.

Timeline for Selection Process

Activity	Date
RFP Distribution	October 31, 2023
Deadline to submit written questions	November 17, 2023
Response to questions	November 22, 2023
Proposal Due	4:30 p.m. ET November 30, 2023
Interviews	December 4-8, 2023
Consultant Selection	December 11, 2023
Contract Execution	December 18, 2023

Contact Information

Any questions regarding this RFP must be sent by email (no phone calls, please) no later than 4:30 pm, Friday, November 17, 2023, to:

Jared Woolston, Director
Sustainable Community & Economic Planning
Borough of Carlisle
jwoolston@carlislepa.org