



# **Town of Bluffton Request for Proposals RFP # 2018-72 HISTORICAL RESOURCE SURVEY SERVICES**

## **1. PURPOSE and BACKGROUND**

The purpose of this solicitation is to seek proposals from interested and qualified firms with experiences in providing historical resource survey services.

The project consists of documenting approximately 450 properties within the current boundary of the Town of Bluffton, SC. The project area consists of properties located along 3 north-south corridors (Buck Island - Simmonsville corridors and Goethe Road corridor) to the north and west of the original one-square mile town, known as Old Town, and includes re-surveying the properties located within Old Town. Before the Civil War, Bluffton was a prominent planter community and during Reconstruction many of the newly freed slaves, of Gullah Geechee descent, settled on the former plantation lands surrounding the Town. Today many of the properties located along the corridors noted above are still owned by African-Americans and there is a thriving community there. During the 1998 Above Ground Historic Resources Survey, a handful of properties along the corridors were identified as historic resources of the African-American community and the 2008 Statewide Survey of Historic Properties of the Old Town Bluffton Historic District also identified a number of significant African-American sites that had not been identified in previous survey efforts.

The objective of this survey is to identify if there are additional properties that are architecturally, culturally, or civically significant to the community and record the historical data with the South Carolina State Department of Archives. The survey would provide the information necessary to determine if it is appropriate to expand the existing National Register District to include all of Old Town as it currently encompasses about 1/3 of that area or if there are enough resources in the northern corridors to consider proposing a second historic district within the Town of Bluffton. As well, the information will be used in future preservation planning, promoting of economic incentives for rehabilitation, development of heritage tourism initiatives, education, and local compliance with state and federal preservation and environmental laws.

This project is funded, in part, by a grant from the U.S. Department of the Interior, National Park Service. A contract will be awarded under a fixed price contract to a responsive, responsible and qualified firm with past, proven, positive experiences in providing historical resource survey services. The target start date for performing these services is June of 2018.

## **2. SOLICITATION TERMS and CONDITIONS**

At any time during the solicitation process, the Town of Bluffton reserves the right to refuse any and all sealed proposals and to waive any technicalities and formalities. The Town of Bluffton reserves the right to negotiate with all qualified Proposers. The Town may cancel this solicitation in part or in its entirety at any time during the solicitation process if it is in the Town's best interest to do so.

### **A. Proposers Responsibility:**

While the Town has used considerable efforts to ensure an accurate representation of information in this RFP, each prospective Proposer is urged to conduct its own investigations into the material facts and the Town shall not be held liable or accountable for any error or omission in any part of this RFP.

Before submitting a proposal, each Proposer shall make all investigations and examinations necessary to ascertain site conditions and requirements affecting the full performance of a contract and to verify any representations made by the Town upon which the Proposer will rely. If the Proposer receives an award because of its submission, failure to have made such investigations and examinations will in no way relieve the Proposer from its obligations to comply in every detail with all provisions and requirements of the contract, nor will a plea of ignorance of such conditions and requirements be accepted as a basis for any claim by the Proposer for additional compensation or relief.

A Proposer, by submitting a proposal represents that the Proposer has read and understands the Request for Proposals requirements and its response is made in accordance therewith and that the Proposer is familiar with the local conditions under which the awarded Proposer must perform.

It is incumbent upon each prospective Proposer to carefully examine these requirements, terms, and conditions. Any inquiries, suggestions, or requests concerning interpretation, clarification or additional information shall be made in writing in accordance with procedures set forth herein. The Town will not be responsible for any oral representation given by any employee, representative or others. The issuance of a written addendum is the only official method by which interpretation, clarification or additional information can be given.

### **B. Questions and Inquiries:**

Questions and inquiries must be received seven (7) calendar days prior to the submittal due date. Replies considered necessary or critical to the solicitation will be issued through an addendum within the Bid Opportunities section of the Town's website at [www.townofbluffton.sc.gov](http://www.townofbluffton.sc.gov). It is the Proposer's responsibility to check the website periodically to determine if an addendum has been issued. Only questions answered by formal written addenda will be binding. Oral and other interpretations or clarifications will be without legal effect and may not be relied upon by potential firms in submitting their qualifications statement. Receipt of all addenda shall be acknowledged by the firm signing and enclosing said addendum acknowledgement with their proposal.

Questions and inquiries regarding this solicitation shall be submitted to:

**Erin Schumacher**  
**Principal Planner**  
**Town of Bluffton**  
**[eschumacher@townofbluffton.com](mailto:eschumacher@townofbluffton.com)**

**C. Restricted Discussions:**

All prospective Proposers are hereby instructed not to contact any member of the Town of Bluffton Council, the Town Manager or Town of Bluffton staff members, other than the noted contact person OR the Town's Purchasing Administrator regarding this RFP or their response at any time during the RFP process. Any such contact shall be cause for rejection of your submittal

**D. Submittal of Proposals:**

Sealed proposals shall be received by or prior to:

**2:00 p.m. on Monday, May 22nd, 2018**

The closing date and time shall be scrupulously observed. Packages containing submittals shall be presented as such that they may be easily identified. The outside of the package shall be identified as follows:

**RFP # 2018-72  
Historical Resource Survey Services  
Town of Bluffton  
Attn: Erin Schumacher**

Packages containing submittals and being delivered by postal, freight carrier, courier or in person shall be sent to:

**Town of Bluffton  
20 Bridge Street  
Bluffton, South Carolina 29910**

**E. Public Opening of Proposals:**

Due to the renovation of Town Hall and the inability to provide proper accommodations for all participants and attendees of the public opening, the public opening will be held immediately following the deadline and at the address, on the date and time specified below:

**2:15 p.m. on Monday, May 22nd, 2018**

**Rotary Community Center / Oscar Frazier Park  
11 Recreation Court  
Bluffton, South Carolina 29910**

No packages will be accepted at the Public Opening location. Packages must be submitted to the Town Hall location prior to the deadline to be considered. Packages mailed or hand delivered to the Rotary Community Center will be rejected.

The names of the firms submitting qualifications packages will be read aloud and recorded. No other information will be provided to the public until after a final contract has been awarded.

**F. Late Submittals:**

***Under no circumstances shall qualifications statements be delivered after the time specified; such submittals will be returned unopened to the submitting firm. The Town will not be responsible for late deliveries or delayed mail. It is the firm's sole responsibility to assure that his/her submittal is complete and delivered at the proper time and place prior to the deadline. Submittals which for any reason are not delivered will not be considered. Offers by facsimile, telegram or telephone are not acceptable.***

**G. Acceptance / Rejection:**

The Town reserves the right to accept or reject any or all proposals. The Town also reserves the right to waive any irregularities, informalities, or technicalities and may at its discretion, request a new solicitation.

Receipt of a proposal does not indicate that the Town of Bluffton has pre-determined a company's qualifications to receive an award or contract. Such determination will be made after the opening and will be based on the Town's evaluation of the proposals compared to the specific requirements and qualifications of a firm as contained and described in this document.

**H. Proprietary and/or Confidential Information:**

A proposal is a public document under the South Carolina Freedom of Information Act (FOIA), except as to information that may be treated as confidential as an exception to disclosure under the FOIA. A firm that cannot agree to this standard should not submit a proposal.

All information that is to be treated as confidential and/or proprietary must be CLEARLY identified, and each page containing confidential and/or proprietary information, in whole or in part, must be stamped and/or denoted as CONFIDENTIAL, in bold, in a font of at least 12 point type, in the upper right hand corner of the page. All information not so denoted and identified may be subject to disclosure by the Town.

**I. Award:**

Award will be made to the Proposer who submits the overall proposal that is judged to provide the most advantageous and best value to the Town. In determining the most advantageous proposal, the Town reserves the right to consider criteria, such as, but not limited to, cost, quality, workmanship, past experience, ability, capability, reputation, and past performance. The Town may opt to establish alternate selection criteria to protect its best interest or meet performance or operational standards.

### **3. QUALIFICATIONS and EXPERIENCE**

At a minimum, and to be considered a responsible proposer, the individuals and/or firm must:

- A. Demonstrate the ability to provide the requested services by having the following qualifications and experience as determined by the National Park Service, which have been previously published in the Code of Federal Regulations, 36 CFR Part 61. The qualifications define minimum education and experience required performing identification, evaluation, registration, and treatment activities. In some cases, additional areas or levels of expertise may be needed, depending on the complexity of the task and the nature of the historic properties involved. In the following definitions, a year of full-time professional experience need not consist

of a continuous year of full-time work but may be made up of discontinuous periods of full-time or part-time work adding up to the equivalent of a year of full-time experience.

- HISTORY: The minimum professional qualifications in history are a graduate degree in history or closely related field; or a bachelor's degree in history or closely related field plus one of the following:
  - At least two years of full-time experience in research, writing, teaching, interpretation, or other demonstrable professional activity with an academic institution, historic organization or agency, museum, or other professional institution; or
  - Substantial contribution through research and publication to the body of scholarly knowledge in the field of history.
- ARCHITECTURAL HISTORY: The minimum professional qualifications in architectural history are a graduate degree in architectural history, art history, historic preservation, or closely related field; or a bachelor's degree in history or closely related field plus one of the following:
  - At least two years of full-time experience in research, writing, teaching in American architectural history or restoration architecture with an academic institution, historical organization or agency, museum, or other professional institution; or
  - Substantial contribution through research and publication to the body of scholarly knowledge in the field of American architectural history.

B. Currently possess or be willing to obtain a Town of Bluffton Business License if contract is awarded.

#### **4. SCOPE OF SERVICES**

This Scope of Services defines the minimal acceptable performance by the proposer in providing the defined services identified below. The successful offeror will demonstrate in its proposal the ability to perform these services for the Town of Bluffton. Offerors are encouraged to propose alternate approaches and/or enhancements to the process as part of the methodology and approach of the submittal package. A detailed scope of work will be negotiated with the awarded firm and accompany the associated contract. The target date for performing these services is June of 2018.

##### **Scope of Work:**

The survey will follow the requirements and standards of the South Carolina Department of Archives and History (SCDAH) set forth in the *Survey Manual: South Carolina Statewide Survey of Historic Places* (SCDAH, revised 2011), "Guidelines for Local Surveys: A Basis for Preservation Planning (National Register Bulletin 24)," "Guidelines for Evaluating and Documenting Rural Historic Landscapes (National Register Bulletin 30)", and "Guidelines for a Statement of Historic Contexts (SCDAH, revised)", where applicable, and as discussed at the initial planning meeting. The following are the activities necessary to achieve the project objectives:

- Survey of approximately 450 properties – deliverables expected are a paper copy and digital copy of the completed survey sheets and the associated photographs of the properties of historic significance

- Community outreach meetings – deliverables expected are minutes of meetings and a map of resources identified by the community as historically or culturally significant. Additional products could include recordings of oral histories.
- Additional tasks required to complete the survey include but are not limited to the following: interviews with community leaders, representatives, and resources; archival research; site visits; and additional community outreach.

The survey and documentation will allow for a number of results listed below:

- The survey will inform the municipal government of the historic resources that exist outside of the current National Register historic district boundaries so that future efforts to incentivize rehabilitation and revitalization of historic properties can include these areas as well;
- The project will provide opportunity to engage the community to learn more about the historic resources in this area as much of the historic narrative is passed through oral history;
- Through this effort additional research can be completed on the community baseball field, Eagles Field, which played an important role in semi-pro Negro baseball leagues in the area; and,
- The data collected would provide the information need to expand the existing National Register Historic District or propose a new district.

## 5. SUBMITTALS and FORMAT

By submitting a proposal, the firm certifies that it has full knowledge of the scope, nature, and quality of work to be performed. Submittals should be prepared simply and economically, providing a straightforward, concise description of the respondent's ability to fulfill the requirements of the scope of work and a solution that is viable and within the Town's best interests.

The Town reserves the right to award a contract pursuant to this RFP without further discussion with proposers. Therefore, it is important that each submittal is complete, adheres to the format and instructions contained herein, and is submitted in the most favorable manner possible. Failure to provide the requested information will render your proposal as non-responsive.

The submittal package shall consist of **five (5) items**: one (1) signed original, three (3) complete copies of the Respondents proposal, and one (1) electronic copy (CD or thumb drive). The submittal package along with the appropriate number of copies shall be sealed and delivered no later than date and time listed above.

The contents of the proposal shall include the following:

### ***A. Letter of Transmittal***

Limit to one (1) or two (2) printed pages.

- Briefly state the firms understanding of the work to be done and the commitment to perform the work.
- Give the names of the persons who will be authorized to make representations for the firm, their titles, and contact information.

- The letter must be signed by an authorized representative of the company who has the authority to commit the company to their proposal as submitted.

**B. Copy of Town of Bluffton Business License**

This section shall include a copy of the firm's Town of Bluffton Business License. If the firm does not currently have a license, then a letter of commitment to obtain a Town of Bluffton Business License if contract is awarded shall be inserted.

**C. Firms Profile**

- State whether the organization is national, regional or local
- State the location of the office from which the work is to be performed.
- Describe the firm, including the size, the number of clerical staff and range of services offered in house.
- Qualifications of project members, operating personnel and management who would be assigned and have direct responsibility for fulfilling the terms of the contract, particularly with similar scope and complexity.
- What ability does the firm have to sustain the potential loss of key personnel and still adequately meet the terms of the contract?

**D. Firms Experience and Performance (Past and Current)**

- Indicate firm's proven, positive past experiences with projects of similar scope and complexity.
- Provide experience in meeting timelines and schedules with clearly established and proven methods for maintaining the budget.
- Indicate services performed for similar projects in the past ten (10) years. Projects shall include demonstrated and successful performances.
- Provide at least five (5) references of clients for whom the firm has provided similar services. Give dates and other particulars of the jobs, contact persons with contact information.

**E. Firms approach and methodology to executing solution and/or performance**

- Provide a concise description of the approach and process the firm will employ to successfully complete the work to be performed to include operational plans, work procedures, processing systems and any specific staffing or equipment resources that will be employed by the firm to support the needs and objective of the Town of Bluffton.
- Provide a statement demonstrating an understanding of the services and support required by this RFP. State how the firm will approach the project and the methodology to be used to perform the services or obtain the solution as described or outlined in the Scope of Services.

- Exceptions – clearly describe any exceptions the firm may have in regards to any requirements stated in the Scope of Services.

***F. Pricing Schedule***

Firms shall provide a fixed, not to exceed dollar amount, accompanied by a fee schedule, itemizing the hourly labor rates of staff and costs associated with expendables, travel, insurance, deliverables, etc. The pricing schedule of this solicitation must be completed and submitted with the proposal. Failure to provide a pricing schedule may result in rejection of the proposal. Contracts from firms submitting a proposal will not be accepted.

**6. EVALUATION, SELECTION, NEGOTIATION and AWARD**

State of South Carolina procurement code will be followed to secure the awarded firm. The contact listed within this solicitation, in coordination with the Purchasing Administrator, will be the coordinator for the selection process and the sole point of contact for all respondents. In addition to the materials provided in the written responses to this RFP, the Town may utilize site visits or may request additional material, information, interviews, presentations or references from the respondent(s) submitting a proposal or offer.

***A. Evaluation Criteria:***

Proposals will be evaluated on the basis of the following criteria:

- a. Proposed Costs**
- b. Qualified Personnel**
- c. Relevant Experience and Performance (Past and Current)**
- d. Methodology and Approach**

A points system will be given to each criteria listed through the identified weighting system:

<b>EVALUATION CRITERIA</b>	<b>MAX POINTS</b>
<b>Proposed Costs</b>	<b>35</b>
<b>Qualified Personnel</b>	<b>25</b>
<b>Relevant Experience and Performance (Past and Current)</b>	<b>20</b>
<b>Methodology and Approach</b>	<b>20</b>
<b>TOTAL POSSIBLE POINTS</b>	<b>100</b>

***B. Evaluation Method***

All responsive submittals will be reviewed and evaluated by a Review and Selection Team. This three (3) to five (5) member committee approach will require selected staff to evaluate the submittals through the following processes:

- Individually provide a detailed review and thorough evaluation of each submittal;
- Individually score each submittal utilizing the scoring method given;
- Combining the scores of each individual team member to form an overall team score;



- Eventual participation in a team discussion, including in-depth evaluations and group interaction after individual review and scores are achieved.

The Town reserves the right to request additional information and/or clarification of any information submitted by any respondent at any time during the evaluation process. This includes, but is not limited to information that indicates financial resources as well as the ability to provide and maintain the services as requested. The Town reserves the right to make investigations of the qualifications of the respondent as it deems appropriate, including but not limited to background investigations.

Firms exhibiting the ability to provide and maintain the services requested; submits a proposal that is formatted correctly; and is inclusive of all the required forms will be considered a responsive and responsible proposer.

**C. Selection Method:**

In general, the Town of Bluffton wishes to avoid the expense (to the Town and to presenting firms) of unnecessary presentations. Therefore, the Town will make every reasonable effort to achieve the ranking using written submittals alone.

If no single top ranked firm can be clearly identified by review of the written submittals alone, then the Review and Selection Team shall request the Purchasing Administrator to schedule the top ranked firms for presentations / interviews.

The Town may choose to conduct oral interviews with, or receive oral presentations from, one or more of the Proposers. If the Town chooses to allow oral interviews and/or presentations, such interviews or oral presentations will be open to the public. The Town will not be liable for any costs incurred by a Proposer in connection with such interviews/presentations (i.e., travel, accommodations, etc.)

The Selection and Review team will rank all complete submittals received and/or formal oral presentations/interviews in order of preference and outcomes will be based on the determination of which firm will meet the needs and provide the best overall value to the Town as it pertains to the requirements of the scope of work.

**D. Negotiations:**

The Town reserves the right to negotiate a final agreement with the top ranked proposal that meets the needs and is considered the best value to the Town of Bluffton. If a contract cannot be negotiated with the highest ranking firm, negotiations may be conducted with the second, and then the third, and so on until a satisfactory contract can be agreed upon and executed. Additionally, should the Town choose to do so, it reserves the right to provide all responsive and responsible Proposers an opportunity to submit their best and final offers.

**E. Award and Contract**

Award will be made in accordance with the Town of Bluffton's purchasing policy and procedures. A contract resulting from an award shall be the Town of Bluffton's purchase order and/or contract, containing the Town's terms and conditions. A sample of the contract has been attached to this solicitation for viewing. Contracts from firms submitting a proposal will not be accepted.