



TOWN OF BLUFFTON

RFQu NO: **2019-29**
ISSUED BY: **Erin Schumacher, Principal Planner**
PHONE NO: **843-706-4561**
EMAIL: **eschumacher@townofbluffton.com**

SUBMIT QUALIFICATIONS PACKAGE PRIOR TO:
CLOSING DATE: Thursday, March 21, 2019
CLOSING TIME: 2:00 p.m.

FAX / E-Mail not accepted

PROJECT TITLE & DESCRIPTION:

Squire Pope Carriage House Preservation Plan

By my signature I certify that this response is made without prior understanding, agreement, or connection with any corporation, firm, business entity, or person submitting a response to this Request for Qualifications, for the services to be provided, and is in all respects true, accurate and without collusion or fraud.

THIS FORM MUST BE SIGNED TO BE CONSIDERED FOR AWARD

COMPANY NAME:

DATE:

MAILING ADDRESS:

PHONE:

FAX:

CITY:

STATE:

ZIP:

SSN OR FEDERAL TAX NO:

TITLE OF AUTHORIZED REPRESENTATIVE:

E-MAIL:

WEB URL:

AUTHORIZED SIGNATURE:

PRINTED NAME:

Request for Statements of Qualifications

RFQu# 2019-29

Squire Pope Carriage House Preservation Plan

1. PURPOSE

The Town of Bluffton is soliciting statements of qualifications from architects, structural engineers, or historic preservation design professional firms to provide **a preservation plan and construction drawings for the Squire Pope Carriage House. This work shall be funded in part by a grant from the U.S. Department of the Interior, National Park Service (NPS) via the South Carolina Department of Archives and History (SCDAH).**

The Squire Pope Carriage House is one of ten (10) antebellum structures remaining in the Town of Bluffton Historic District. It is architecturally, historically, and potentially archeologically important to the Town. The carriage house is comprised of two structures which were once separate outbuildings which serviced the larger main house. During the Burning of Bluffton on June 4, 1863, Federal troops set fire to the main house but the outbuildings remained. Following the end of the Civil War, the two structures were joined together and have remained in that configuration ever since. The larger element is one room deep with a two-story, full-length L-shaped front wrap-around porch that faces the May River. The smaller element is small, forward-facing gabled structure that has been connected at the east and is partitioned into two rooms separated by a bathroom. The river-facing elevation is accentuated with a decorative bay window. The scope of work shall include all of this now-connected structure.

2. SCOPE OF WORK

The Town intends to award one contract to the most highly qualified firm on the scope of work detailed below.

The preservation plan will be funded by the SCDAH grant. Activities shall include:

- Document existing historical background information and identify significant character-defining features of the building
- Documentation of existing conditions with narrative and photos
- Assessment of structural integrity
- Development of a preservation treatment philosophy to guide the future rehabilitation efforts
- Creation of a preservation plan outlining the recommended process for rehabilitation, including initial stabilization and further rehabilitation. Plan should include anticipated costs per phase. NOTE: any stabilization and/or rehabilitation work is not part of this scope.

All recommendations shall be in compliance with the Secretary of the Interior's Standards for Treatment of Historic Properties.

Separately funded shall be the creation of construction drawings.

Scope, Documentation and Report Requirements

1. Introductory information - including a table of contents, property identification information such as: address, ownership, listing in historic registries, building/structure type, etc., and an executive summary, acknowledgments, reason for the report, property's current use and proposed use, listing of report participants and their roles, etc.

2. Historical overview – due to the shortened time required to produce deliverables, and the likelihood of an adaptive use, it is the Town’s expectation that the time to research will not be exhaustive. Instead, the focus will be an historic overview based on available local resources including available photographs, sketch drawings and interviews with family members.
3. Summary description of the building’s existing condition – including photos and narrative.
 - a. Detailed existing condition description of the individual exterior material nonstructural components, e.g. siding, brick, windows, doors, porches, trim, cornice, etc.
 - b. Detailed room by room description including documentation of interior features, finishes, and materials. Detailed identification of areas of deterioration and repair of floors, walls, ceilings, doors, windows, trim, fireplaces, stairs, and other architectural features.
 - c. Detailed descriptions of the existing conditions of the various structural systems including foundations, bearing walls, framing, beams, floor systems, roof systems, and associated connection and construction details. Descriptions should include identification and location of deficiencies, questionable construction details, failed details, and attempted corrective measures, etc. Effective structural systems must also be documented.
 - d. Evaluate the condition of each feature, element or space. Provide a detailed discussion of the existing condition and integrity of each element, feature, or space based on the comprehensive physical evaluation. The Condition Evaluation must include photographic documentation to illustrate the condition (or range of conditions for repetitive elements or features). Use consistent terminology in your evaluation and discussion on the condition of each element. Provide a definition of each rating condition with specific indicators, percentage of replacement necessary, etc. The rating of each element should be accompanied by a comprehensive discussion of the condition. The worse the condition, the more discussion is required.
4. Savannah College of Art and Design (SCAD) students utilized this site for a class project. Their sketches and their preliminary condition assessment are available if the vendor finds it helpful. Vendor will be required to create AutoCAD drawings of existing conditions as a supplement to the students’ condition assessment.
5. Provide photo documentation including contextual exterior views of the building/structure in its existing setting, views of elevations, interior views of significant rooms/spaces, representative views of structural systems, and representative views of deficiencies, questionable construction details, failed details, and attempted corrective measures, etc. These photos should be keyed to the AutoCAD drawings in Number 4 above.
6. Provide a statement of treatment philosophy addressing the importance of the recommended treatment, and substantiate it based on accurate historical information and existing conditions. All recommendations should maximize retention of the historic character and minimize the loss of historic fabric. The rationale for the proposed treatment recommendation should be discussed and justified. An important input into the treatment philosophy will be the opinions of internal (Town) stakeholders. The Town will help organize a stakeholders meeting as a means of gathering input from various departments and Town leadership.
7. Provide a recommendation for each element, feature, or space based on the evaluation of existing conditions and the recommended treatment. Recommendations must detail a defined course of action, comply with and specifically address the Secretary of the Interior’s Standards for the Treatment of Historic Properties and the recommendations in the Guidelines. If necessary, the recommendations must include conceptual level design solutions for stabilization and/or repair. The recommendations must be

prioritized into a logical and sequential phasing plan. This order will rank the most urgent work, such as deterioration, structural weakness, and/or life safety issues over less urgent repairs. At this time, the Town's highest and most urgent priority is to stabilize and weatherize the home.

8. Provide a detailed estimate of the probable construction cost of the specific individual recommendations. These costs must be coupled with the phasing plan to provide a total for each individual phase. If possible, estimate the time frame for completion of the recommendations.
9. Create a maintenance plan which includes recommendations for routine and cyclical maintenance along with designated corresponding time or intervals.
10. Assemble a bibliography which lists all the sources utilized.
11. Include drawings, plans, design drawings, specifications and other pertinent information in an Appendix.
12. Incorporate a "Glossary" or "Terms and Definitions" section.

Deliverables

Respondent will be required to communicate project status verbally and in writing at least monthly to comply with grant reporting requirements. Vendor shall provide two (2) hard copies and one (1) electronic copy of final preservation plan as well as one (1) electronic copy and two (2) full-sized copies of construction drawings and specifications.

Of critical importance is the schedule for completion. Respondent will be asked to provide a schedule showing all major milestones; the preservation planning work must be completed no later than September 1, 2019. Drawings and specifications may be provided after the September 1 deadline.

3. SOLICITATION TERMS and CONDITIONS

Respondent's Responsibility:

While the Town has used considerable efforts to ensure an accurate representation of information in this RFQu, each prospective Respondent 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 RFQu.

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

It is incumbent upon each prospective Respondent 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.

Questions and Inquiries:

Questions and inquiries must be received in writing at or before the date below. 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. It is the Respondent'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 qualifications statement.

Questions and inquiries regarding this solicitation shall be submitted to:

Erin Schumacher, AICP
Principal Planner – Historic Preservation & Urban Design
Town of Bluffton
eschumacher@townofbluffton.com

Deadline to submit questions:

4:00 pm on Thursday, March 7, 2019

Restricted Discussions:

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

Submittal of Qualifications Statements:

Sealed qualifications statements shall be received by or prior to:

2:00 pm on Thursday, March 21, 2019

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:

RFQu # 2019-24
Squire Pope Carriage House Preservation Plan
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

Public Opening of Qualifications Statements:

The public opening will be held fifteen minutes following the deadline and at the address, on the date and time specified below:

2:15 pm, Thursday, March 21, 2019
Main Conference Room
Town of Bluffton Town Hall
20 Bridge Street
Bluffton, South Carolina 29910

No packages will be accepted at the Public Opening. Packages must be submitted to the Town Hall location prior to the deadline to be considered.

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.

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.

Acceptance / Rejection:

The Town reserves the right to accept or reject any or all submittals. 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 submittal 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 qualifications statements compared to the specific requirements and qualifications contained in this document.

4. SUBMITTALS and FORMAT

By submitting a statement of qualifications, 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.

The Town reserves the right to award a contract pursuant to this RFQ without further discussion with respondents. 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 qualifications statement as non-responsive.

The submittal package shall consist of **five (5)**, one (1) signed original and **four (4)** complete copies and **one (1)** electronic copy of the Respondents statements of qualifications. 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 Statement of Qualifications shall include the following:

A. Signatory Sheet

Completed, signed and certified qualifications statement (see first page of this solicitation).

B. Letter of Transmittal, Statements of Compliance, and Schedule

- The letter must be signed by an authorized representative of the company who has the authority to commit the company to their statement as submitted.
- Letter shall include a statement that the firm will comply with Title VI of the Civil Rights Act of 1964, Section 504 of the Rehabilitation Act of 1973, and the Age Discrimination Act of 1975, as amended, prohibiting discrimination on the basis of race, color, nation origin, disability or age in federally assisted programs.

- Letter shall include a statement that the firm will comply with 43 CFR, Part 12, Section 12.510, Debarment Certification, that neither the firm nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, nor voluntarily excluded from participation in this transaction by any Federal department or agency.
- Attach a schedule that shows tasks, project milestones, deliverables and project meetings with an end date for all preservation planning deliverables no later than September 1, 2019.

C. Firm's Profile

- State whether your organization is national, regional or local and the office from which this work would be performed.
- Provide the resumes of key personnel. Include education, qualifications and related experience, and professional licensing/certifications. Indicate team members who meet the Professional Qualifications Standards of 36 CFR Part 61.
- Provide firms MBE/WBE status and local Town of Bluffton business certificate as applicable.
- The name, resumes and qualifications of any subcontracted personnel or firms and what their intended role or scope will be.

D. Firm's Experience

- Provide a statement of the firm's overall professional history including number of years of experience with project related to historic preservation.
- Indicate firm's experiences with projects of similar scope and complexity by providing three (3) detailed case studies completed within the last five (5) years. Include images or graphics, a brief description of the scope of the project and its period of performance, and your firm's role.
- Include a reference for each case study cited above. Reference should include the person's name and title, phone number, and email address.

E. Project Approach

- The approach must show an understanding of the project and the ability to perform the tasks outlined in the scope in a manner that is well-organized, thoughtful, and creative. Include an outline of the Stakeholder's plan which addresses Respondent's method of soliciting and facilitating inputs. At this time, only internal inputs are contemplated and members of the public will not be solicited.

5. EVALUATION, SELECTION and NEGOTATION METHOD

State of South Carolina procurement code will be followed to secure 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 RFQ, the Town may utilize site visits or may request additional material, information, interviews,

presentations or references from the Respondent(s) submitting qualifications packages.

A. Evaluation Criteria:

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

- a. Qualifications of the firm and key personnel
- b. Project approach
- c. Past performance experience
- d. References
- e. Certifications and schedule
- f. Local business preference, MBE/WBE

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

EVALUATION CRITERIA	MAX POINTS
Qualifications of the firm and key personnel	30
Project approach	20
Past performance experience	20
References	15
Certifications and schedule	10
Local vendor preference, MBE/WBE	5
TOTAL POSSIBLE POINTS	100

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 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.

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 Respondents. 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 Respondent in connection with such interviews/presentations (i.e., travel, accommodations, etc.)

The Town shall rank all complete submittals received and/or formal oral presentations/interviews in order of preference and will be based on determination of which respondent meets the highest qualifications and needs of 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 respondent that meets the needs of 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.