

## BACKGROUND

The Town of Palm Beach is on a barrier island between the Atlantic Ocean and Lake Worth that was incorporated in 1911. The Town is approximately 16 miles long and is comprised of approximately 8,900 full-time residents and 25,000 seasonal residents.

The Town of Palm Beach Landmarks Preservation Ordinance was adopted in 1979. Currently, there are approximately 352 landmark sites. The purpose of creating a Landmarks Preservation Ordinance, which included the creating of a Landmarks Preservation Commission, was to protect historic resources with intrinsic aesthetic, or architectural character, and to better facilitate the upkeep and maintenance of those structures so designated. The ordinance lists these as its goals:

1. Safeguard and enhance that which reflects the Town's history and heritage.
2. Stabilize and improve property values.
3. Foster civic pride in the notable accomplishments of the Town's past.
4. Protect the Town's attraction to residents and visitors.
5. Strengthen the economy of the Town.
6. Promote the education, pleasure and welfare of residents and visitors.

Anticipated work includes providing landmark/historic preservation consultant services to the Town of Palm Beach through the Planning, Zoning and Building Department. The specific types of services that will and may be required are detailed in the scope below. Performing these services will require skills in effectively working with a wide range of groups of stakeholders, including property owners, Town staff, the Landmarks Preservation Commission, Town Council, and local advocates and advocacy groups. Furthermore, the consultant selected must be able to prioritize and manage multiple assignments, understand the availability of materials and where to find them, and how to relate information and find significance in the information. The work shall be assigned by the Director of the Planning, Zoning & Building Department in conjunction with the annual schedule of the Landmark Preservation Commission and the Town Council for a multiple-year contract.

The Town proposes to interview a select number of those expressing an interest in providing these services and may request further documentation for evaluation. Entering into a contract with a consultant does not obligate the Town to issue any purchase orders with the successful consultant.

The following links to Town documents are provided for informational purposes:

Landmarks Manual: <http://townofpalmbeach.com/DocumentCenter/View/1010>  
Development Review Application (PDF):  
<http://townofpalmbeach.com/DocumentCenter/View/14797>

## **PURPOSE AND SCOPE OF SERVICES**

The purpose of this RFP is to seek the assistance of a professional landmark/historic preservation consultant to provide professional landmark/historic preservation consulting services on an on-going basis to the Town. Upon Town Council authorization, the selected consultant will be required to do the following:

1. Provide historic research in Town archives and other sources.
2. Attend monthly and special Landmark Preservation Commission and Town Council meetings.
3. Visit sites as needed, with or without Town officials.
4. Prepare and present landmark designation (see attached sample for required data/information) and other reports to the Landmark Preservation Commission and Town Council. Research and drafting of reports occurs throughout the year; however, consideration of land marking a site only occurs between the months of November and April.
5. Review certificates of appropriateness applications for landmark structures, sites and vistas.
6. Prepare ad valorem tax exemption applications as directed.
7. Respond to questions from residents, property owners, Landmark Preservation Commission members, Town Council, staff and others.
8. Appear on behalf of the Town in any civil proceedings and testify as needed.
9. Additional reports and/or work as required.

The selected consultant is expected to be retained on an average of 20 hours per week (an average of 80 hours a month), and will provide their own computer, internet connection, e-mail address, and a phone to use for research and consulting services. The selected consultant will provide a single point of contact for consultant services (Project Manager), including invoicing, deliverables, coordination of assignments and schedule management. The Project Manager shall meet with Town staff and attend all public meetings on an “as needed” basis as necessary.

The quantity of work will vary through the contract term. For each assignment or submitted request, the consultant will provide to the Town a written report in electronic format (file in original program utilized and PDF, with MS Word being the required word processing program, and MS products for all other programs), including but not limited to appendices, reports, reference material, photographs and graphics. GIS knowledge preferred. Services, when requested, must be responded to promptly and as needed to meet agenda deadlines for public meetings. Time frames for deliverables will be developed for specific assignments and determined upon contract finalization. Completion of deliverables shall be subject to review by staff.

## **QUALIFICATIONS/EVALUATION CRITERIA**

The Town of Palm Beach desires to retain a consultant possessing the research, analytical and communication skills to research, analyze, prepare and present technical

landmark designation reports for various properties in the Town that the Landmark Preservation Commission has identified as potential landmarks or historic properties. The selected consultant must be able to present accurate, relevant data and analysis in clear and concise graphic and written presentation form. The consultant must have the ability to make high impact presentations in front of the Landmark Preservation Commission, Town Council, and various neighborhood and civic groups as needed. Respondents must demonstrate recent experience in successful completion of similar work for other municipalities. The selected consultant must demonstrate proficiency in all aspects of municipal landmark/historic preservation issues.

Specific experience in researching architectural archives, analyzing records and plans, and preparing and presenting technical/architectural reports to the Landmark Preservation Commission and Town Council is essential. The successful consultant must have extensive knowledge of historic preservation principles and practices, and be able to provide any and all professional land marking and historic preservation services for the Landmarks Preservation Commission and Town Council.

## **WORK TO BE PERFORMED**

1. Provide historic research in Town archives and other sources.
2. Attend monthly and special Landmark Preservation Commission and Town Council meetings.
3. Visit sites as needed, with or without Town officials.
4. Prepare and present landmark designation (see attached sample for required data/information) and other reports to the Landmark Preservation Commission and Town Council. Research and drafting of reports occurs throughout the year; however, consideration of land marking a site only occurs between the months of November and April.
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7. Respond to questions from residents, Landmark Preservation Commission members, Town Council, staff and others.
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9. Additional reports and/or work as required.

## **WORK PRODUCTS**

1. Reports
2. Attendance at meetings
3. Tax Abatement and grant applications
4. Presentations
5. Resolution of issues
6. Response to inquiries

## **CHARGES/FEES**

Provide details on proposed fees and any additional charges if applicable.

## **PROPOSAL REQUIREMENTS**

This document is intended to be used as the instrument to transmit proposals and to define the terms, conditions and specifications desired by the Town to receive proposals for a Historic Preservation Consultant. It is the intent of the Town to select a single proposer to supply the services necessary for successful completion of the proposal as defined herein. Nothing in this RFP is intended to restrict the Town of Palm Beach in any way in the selection of the proposal that best meets the needs of the Town. The Town reserves the right to reject any or all offers and to negotiate changes in proposals or best and final offers.

## **TOWN CONTRACT COORDINATOR**

The Town Contract Coordinator for this project will be Wayne Bergman, Planning Zoning & building Director at [wbergman@townofpalmbeach.com](mailto:wbergman@townofpalmbeach.com). After Notice to Proceed/Purchase Order is issued, all communications and correspondence shall be directed to Mr. Bergman, with copies of the correspondence to the Purchasing Division at 951 Okeechobee Road, Suite "D", West Palm Beach, FL 33401.

## **CONTRACT**

The selected Proposer will be expected to enter into a formal agreement at the time of contract award.

The selected Proposer will also be expected to submit a scope of services for the purpose of entering into a formal contract. Scope of services and pricing shall be negotiated and decided prior to award of contract and become part of the contract document at award.