

REQUEST FOR PROPOSALS DRAFT 3

PART A:

1. Invitation to Proponents

This Request for Proposals (“RFP”) is an invitation by the Thousand Island Park Landmark Society (“Landmark”) to prospective Proponents to submit Proposals for the provision of **Historic Preservation Consulting Services for Thousand Island Park**, as further described in Part B – The Deliverables (the “Deliverables”).

Thousand Island Park (TI Park) is a resort community on Wellesley Island in the St. Lawrence River. TI Park began as a Methodist Camp Meeting Association in 1875 and grew from a collection of tents and tent platforms to a vibrant community of summer cottages in an array of vernacular styles including Eastlake, Queen Anne, Shingle, and Bungalow. Now TI Park is run as a privately held, non-denominational, Thousand Island Park Corporation (“Corporation”).

Landmark is a 501 C3 not-for-profit corporation located in Thousand Island Park, NY. More information is available at thousandislandparklandmarksociety.org The organizational mission states that Landmark is:

“dedicated to preserving the historical, architectural and infrastructure resources of Thousand Island Park, New York for our community, visitors, and future generations”.

TI Park has been listed on the National Register of Historic Places since 1982. Landmark led and organized the registration process assisted by a large number of community volunteers. The information assembled for the original registration has not been reviewed since then and is currently out of date.

Landmark seeks proposals from historic preservationists for a two-part project:

- to update the National Register and
- submit Historic Preservation Certification Applications (Part 1 – Evaluation of Significance) for 4 properties owned by the Corporation.

This project will be administered by a steering committee where both Landmark and the Corporation will be represented.

Individual historic preservationists are encouraged to submit proposals.

Due to the location of Thousand Island Park, the seasonal nature of the community’s preservation activities and the desire to involve the community and complete the survey through use of volunteers, the project will take place over two years, starting once an agreement with the selected proponent is negotiated and contract letter is signed, i.e. approximately 15 days after selection (see Section 3).

The Consultant will provide services on a part-time basis.

Proposals must be submitted electronically by midnight on **August 21, 2017**. All proponents will be sent a confirmation email when their proposal is received. Both the successful proponent and those who were unsuccessful will be notified regarding their proposal no later than **August 31, 2017**

2. Contact:

Any communication regarding the RFP, including proposals, must be directed by email to:

- Julie Mathien,
Co-President,
Thousand Island Park Landmark Society
jm@juliemathien.ca

and

- Cathy DeGeorge,
Assistant General Manager,
Thousand Island Park Corporation,
tiparkcorp3@twcmetro.biz

3. Negotiation of Contract:

The successful Proponent will be requested to enter into negotiations for an Agreement with Landmark for the provision of the Deliverables outlined in Part B this RFP. It is Landmark's intention to enter into the Agreement with only one (1) legal entity. The term of the Agreement is to be for a period of two (2) years starting when the agreement is finalized and the contract letter is signed by both Landmark and the successful proponent.

No contract letter will be released until a written Agreement has been negotiated and finalized. If an Agreement has not been finalized within fifteen days from the notification to the successful Proponent, Landmark reserves the right to approach the Proponent who ranked second.

Landmark reserves the right in its sole discretion to defer any Agreement or to cancel this RFP at any time before or after closing without providing reasons for such cancellation.

PART B DELIVERABLES

1. Project Objectives

- To update the information on TI Park related to the National Register of Historic Places
- To certify four (4) TI Park public buildings as historically significant

- To raise awareness regarding historic preservation through public education and the use of volunteers in the project.

2. Project Summary

This two-part project will :

- update the National Register and
- submit Historic Preservation Certification Applications (Part 1 – Evaluation of Significance) for 4 properties owned by the Corporation

3. Scope of Services

The scope of services includes but is not limited to:

a. Organize an architectural survey and submit a National Register update to the New York State Historic Preservation Office (“NY SHPO”) for 400+ properties in TI Park including cottages, boat houses and several public outdoor spaces not previously documented. It is anticipated that 50% of the buildings will be surveyed in each of two summers.

Work with a volunteer coordinator, steering committee, summer intern and community to:

1. Select or create a survey form for volunteers using the NY State Historic Resource Inventory Form or a form that will document the data that need to be entered into NY SHPO CRIS.
2. Conduct a workshop to orient volunteers to the survey process and provide volunteer support where needed throughout the process.
3. Using photos and survey forms from volunteers, review and update the structural changes, architectural descriptions, and photographs for houses, Corporation owned buildings, boat houses, and public spaces in TI Park.
4. Work with NY SHPO to compile the final submission for the updated National Register nomination.
5. Provide additional support to the project as needed.

Upon completion of survey, part of the update would ideally include an inventory, expressed in a searchable data sheet with dates, styles, links to photos, known families, architects and builders.

b. Organize and submit a compliant Historic Preservation Certification Application (Part 1 – Evaluation of Significance) to NY SHPO for the Corporation on 4 buildings; Tabernacle, Library, Chapel, and Pavilion.

Conduct survey and documentation of these 4 buildings in addition to the data collected for the National Register update. Submission of Certification Application (Part 1 – Evaluation of Significance) to include:

1. An in-depth historical account of the buildings in terms of both interior and external structural and cosmetic changes that were made over the life of the building (supported by dated photos)
 2. Detailed descriptions of the “character defining features” of the structure with lists of those features that remain in the original state as well as those features that have been altered over time
 3. Blueprints or floorplans with rooms and structural areas numbered to create a “photo key” that matches the corresponding numbered photos that depict each room and structural area (i.e. porches, dining room, stairways, sleeping rooms, shops, building exterior, etc.)
 4. All numbered and dated photos must be submitted in duplicate on photographic paper
 5. A detailed account of the facts that support the historic significance and role of the specific structure in the community
 6. Submit any revisions that the NY SHPO may require.
- c. *Provide a detailed schedule and workplan for the completion of all of the tasks associated with both parts of the project.*

4. Skills and Qualifications

The Consultant should provide qualified resources to provide the Deliverables. (S)he must exhibit the appropriate skills and qualifications, including experience in a similar historic preservation environment, demonstrated project management skills, expertise in architectural surveys, data gathering and analysis, experience with relevant government programs, processes and documents and previous experience working with community volunteers and a summer intern. Excellent communication skills, both written and verbal, are required.

At a minimum, the Consultant must have a Bachelors or Masters degree in historic preservation, architectural history, or closely related field

The Consultant must have the ability to travel to Thousand Island Park, NY and other sources of data and information as needed.

5. References

Proponents must provide three (3) references according to the format below from clients who have obtained similar goods or services to those requested in the RFP from the Proponent in the last five (5) years.

Landmark reserves the right to conduct reference checks.

Reference #

Company Name:	
Company Address:	
Contact Name:	
Contact Telephone Number:	
Contact Email:	
Date Work Undertaken:	
Nature of Assignment:	

6. Proposal Format and Requirements

The maximum page count is to be 10 pages plus supporting documentation.

- a. Proponent
 - 1. Experience and Qualifications
 - 2. Relevant References
 - 3. Experience with similar projects

- b. Technical Approach and Methodology
 - 1. Understanding of the Project Objectives, Deliverables and Scope of Services
 - 2. Detailed Project Plan
 - 3. Comprehensive Services
 - 4. Proven ability to deliver high quality and finely coordinated materials
 - 5. Compliance with Timelines
 - 6. Proven ability to meet project schedules and objectives

- c. Proposed Sub-Contractors (if any)
 - 1. Experience of Proponent's Sub-Contractors (consultants) with similar projects
 - 2. Personnel roles on project and brief resume noting relevant experience as employee of Proponent
 - 3. If sub-contractors are proposed, describe the team approach and staff assignment by project phase
 - 4. Continuity of team throughout the project
 - 5. Has the team worked together before? If so, what projects?
 - 6. If sub-contractors are proposed, the Proponent is responsible for coordinating this RFP and consolidating the material into one (1) Proposal.

No external documents, web sites or embedded documents may be included in proposals.

Proponents may amend proposals until the deadline for submission.

No proposal will be opened until after the deadline for submission.

7. Material disclosures

a. The successful Proponent will be working with a steering committee which will include Landmark Board members, Corporation staff and a summer intern.

b. Work Locations. The successful Proponent will be on Thousand Island Park for interviews and meetings as needed to support the project. Especially off-season, the successful Proponent will be available for teleconferences as needed. Research and other field work will be conducted where necessary, including relevant archives. The successful Proponent will be responsible for travel and accommodation expenses such as lodging, meals, parking, etc.

c. As outlined in section 6 c., the Proponent should provide an outline of knowledge, skills and expertise of proposed personnel, including sub-contractors, if any, as related to the Deliverables (e.g. experience in conducting an historic architectural survey and a historic building certification process).

PART C EVALUATION AND CRITERIA

The following is an overview of the categories and weighting for the evaluation criteria of the RFP.

Rated Criteria Category	Weighting (Points)
1. Experience and Qualifications	40 points
2. Technical Approach	30 points
3. Pricing	30 points
Total Points	100 points

1. Experience and Qualifications – Total Points = 40 points

Each Proponent should provide the following in its Proposal:

a. **Experience.** The Proponent should provide her or his experience and, if applicable, an outline of their organization. The Proponent will be evaluated on depth of relevant services provided in the public and/or private sector and the length of time providing these services. The Proponents should provide references as indicated in Section 5, above. (20 points).

- b. **Past Cases.** The Proponent should provide descriptions of a past case in successfully providing similar Deliverables, state the challenges and the successful factors in this past case. (20 points)

2. Technical Approach – Total Points = 30 points

Each Proponent should provide the following in its Proposal:

- a. **Understanding of the Deliverables.** The Proponent should provide their understanding of the Deliverables and the required solution. The Proponent will be evaluated on whether the solution described meets or exceeds the project requirements, intent, and/or specifications and demonstrates the Proponent’s correct understanding of the engagement; (15 points)
- b. **Project Plan.** Provide a detailed project plan including milestones, planning assumptions, risk management and a breakdown of project staffing requirements (both from the Proponent and Landmark) including time commitments. The project plan should be realistic, and cover core requirements and applicable value-added requirements and applicable innovative requirements and knowledge transfer. The project plan should also reference back to the anticipated tasks/activities in the scope of services; (10 points)
- c. **Timeline.** The Proponent should provide an explanation on how it will address the timeline requirements. The intent is to complete the project within two years in a timely and proper manner. The Proponent should provide justifications using past experience. (5 points)

3. Costing – Total Points = 30 points

Proponents must provide their pricing response for each of the two parts of the project and for the project as a whole according to but not limited to the deliverables outlined in Part B.

The project will not reimburse expenses, including but not limited to:

- Administrative mark up
- Travel
- Transportation
- Parking
- Meals
- Accommodations

4. Assessment:

At the conclusion of the evaluation, all scores will be added and the highest-ranking Proponent will be selected for Agreement negotiations.

In the event of a tie overall score, the successful Proponent will be determined as follows:

The Proponent with the highest points award for “Experience and Qualifications” will be deemed to be the highest scoring Proponent. If the tie is not broken by the foregoing mechanism, the Proponent with the highest points award for “Fee Structure” will be deemed the highest scoring Proponent.

Negotiations will not constitute a legally binding offer to enter into a contract on the part of Landmark or the Proponent.

PART D PRESENTATION

The evaluation committee may, at its sole and absolute discretion, decide to move forward with a presentation or interview from up to the top three (3) Proponents.

During the presentation, the evaluation committee will be looking for greater clarity and information on the Proposal in terms of understanding of the Deliverables, project plan, timelines, proposed personnel, past cases, etc.

Landmark reserves the right to revisit and adjust the points allocated to Section C, Evaluation and Criteria, taking into consideration the information presented by the Proponent.

PART E GENERAL INFORMATION AND INSTRUCTION TO PROPONENTS

1. Proponents should structure their Proposals in accordance with the instructions in the RFP. Where information is requested in the RFP, any response made in a Proposal should reference the applicable section numbers of the RFP where that request was made.
2. Landmark makes no representation, warranty or guarantee as to the accuracy of the information contained in the RFP. Any quantities shown or data contained in the RFP are estimates only and are for the sole purpose of indicating to Proponents the general size of the work. It is the Proponent’s responsibility to avail itself of all the necessary information to prepare a Proposal in response to the RFP.
3. Proponents shall promptly examine the RFP, and
 - a. shall report any errors, omissions or ambiguities; and
 - b. may direct questions or seek additional information.
4. No such communications are to be directed to anyone other than the contacts listed on page 2. Landmark is under no obligation to provide additional information. It is the responsibility of the Proponent to seek clarification from the contacts on any matter it considers to be unclear. Landmark shall not be

responsible for any misunderstanding on the part of the Proponent concerning the RFP or its process.

5. When evaluating responses, Landmark may request further information from the Proponent or third parties in order to verify, clarify or supplement the information provided in the Proponent's submission. Landmark may revisit and re-evaluate the Proponent's response or ranking on the basis of any such information.
6. A Proponent may not at any time directly or indirectly communicate with the media in relation to the RFP or any contract awarded pursuant to the RFP without first obtaining the written permission of the contacts.
7. Landmark may disqualify the Proponent or rescind an Agreement subsequently entered if the Proponent's response contains misrepresentations or any other inaccurate, misleading or incomplete information.

PLEASE NOTE FORM ON PAGE 10.

PART F PROPONENT INFORMATION

Please fill out the following form, and name one person to be the contact for the RFP response and for any clarifications or amendments that might be necessary. PLEASE REMEMBER TO INCLUDE THIS INFORMATION WITH YOUR SUBMISSION.	
Full Legal Name of Proponent:	[enter your response here]
Any Other Relevant Name under Which the Proponent Carries on Business:	[enter your response here]
Street Address:	[enter your response here]
Municipality; State/Province:	[enter your response here]
Zip/Postal Code:	[enter your response here]
Phone Number:	[enter your response here]
Website (If Any):	[enter your response here]
RFP Contact Person and Title:	[enter your response here]
RFP Contact Phone:	[enter your response here]
RFP Contact E-mail:	[enter your response here]