

2016

Historical Commission

Town of Wellesley

Tad Heuer, Chair

[HISTORIC DATE PLAQUES ELIGIBILITY RESEARCH]

Request for Proposal



RFP document prepared by:
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**WELLESLEY HISTORICAL COMMISSION
REQUEST FOR PROPOSALS
RESEARCH ON STRUCTURES ELIGIBLE FOR HISTORIC DATE PLAQUES**

1.0 INTRODUCTION

The Town of Wellesley Historical Commission (“the Commission” or “WHC”) is seeking to engage a research consultant (“the Consultant”), for the purposes of determining the precise dates of all structures or buildings in the Town that were constructed prior to 1919, and are thus eligible for historic date plaques issued by the WHC. The WHC estimates that approximately 500 structures require such research.

1.1 BACKGROUND

Community Location

The Town of Wellesley (incorporated in 1881), Norfolk County, is approximately 10 miles west of Boston. It is bordered by Natick on the west, Weston and Newton on the north and northeast, Needham on the southeast and Dover on the southwest. It is approximately 10.5 square miles in area, and contains approximately 9,000 structures, consisting predominantly of single-family homes, as well as smaller numbers of municipal buildings, collegiate buildings, and commercial structures.

The Plaque Program

In the Spring of 2014, the WHC authorized an extension of its historic date plaque program. Previously, only structures from 1881 — the date of the Town’s incorporation — or earlier were eligible for a WHC plaque. The WHC has now expanded eligibility to all structures constructed at least 100 years ago, and will reassess this eligibility cutoff in 2019.

The WHC estimates that approximately 700 structures in Wellesley date from 1882 to 1916, and are thus newly-eligible for WHC plaques immediately. Approximately 150 additional structures will become eligible between 2017 and 2019. Moreover, of the estimated 200 remaining pre-1881 structures in Wellesley, WHC estimates that perhaps 100 are either lacking plaques or may have been dated imprecisely when plaques were issued previously. In total, WHC estimates that approximately 950 structures are eligible for a new or replacement plaque and has determined conclusive dates for historical plaque purposes for approximately half.

The WHC thus estimates that approximately 500 structures require research to establish their conclusive date of construction for purposes of plaque eligibility.

Before the WHC authorizes a historic date plaque to be issued, the WHC requires that the date of construction of the structure be researched and confirmed. In order to ensure that the date on each plaque is accurate, it is necessary to research the date of the structure itself, using Town records as well as deeds and other documentation. Unfortunately, the dates reported in the Town

Assessor's database — particularly for pre-war structures — are often only rough estimates, and are not reliable for WHC purposes.

Typically, the research on a structure includes, at minimum, a deed and title search, a review of the Town assessment records and the Annual Town Reports, and a search of the *Wellesley Townsman* archives for references to the property. Other resources, including census records, records held by the Massachusetts Historical Commission, records held by Town offices, and records held by the Wellesley Historical Society, are often consulted as well. For each structure, a brief consolidated report is generated, establishing the date of construction. A current photograph of the structure is also taken and included. This report is provided to owners who seek to obtain plaques and is also maintained by WHC as its official record indicating the construction of the structure.

Goals of the Plaque Program

The goal of the expanded WHC plaque program is to ensure that all owners of eligible structures can obtain and display an accurate WHC historic date plaque. The WHC plaque program contributes significantly to the increased recognition and appreciation of Wellesley's historically built environment. While WHC plaques impose no legal obligations on owners, the WHC believes that the recognition conferred on structures through the plaque program encourages pride amongst the owners of the structures resulting in better preservation and maintenance of Wellesley's historic buildings.

2.0 ACCESS TO MATERIALS

The WHC will make available all relevant public information pertaining to its issuance of date plaques, including materials as to existing plaque date research that can be found on its website, www.wellesleyhistoricalcommission.org. An example of an existing WHC research report is attached as Exhibit A.

Additional materials available at Town Hall or at the Wellesley Free Library include annual Wellesley Town Reports, historical atlases of the Town, and the Wellesley Townsman. Deeds and other conveyance instruments recorded at the Norfolk County Registry of Deeds are also relevant.

Other supporting materials include "Form B" submissions to the Massachusetts Historical Commission, resources located at the Wellesley Historical Society, and records on file with the Town's Building Department.

The Consultant shall, to the maximum extent feasible, utilize existing information, reports and studies on file with the WHC and the Town so as not to duplicate work already done.

3.0 SCOPE OF SERVICES

The Consultant will work closely with the WHC to:

- Develop a strategy for identifying potentially-eligible structures for research;
- Develop an inventory of potentially-eligible structures for research;
- Prioritize the order in which structures shall be researched;
- Establish the time frame in which research reports for the estimated 500 potentially-eligible structures will be delivered. Additionally, the consultant will identify a method of prioritizing research and delivery of reports for structures for whom a property owner has affirmatively sought a determination of date from the WHC for purposes of plaque eligibility;
- Develop a research strategy for identifying the relevant data sources needed for determining the construction date for each potentially-eligible structure; and
- Produce a research report, in the format described in **4.0 Format of Final Deliverables**, establishing a conclusive construction date (or the nearest estimate thereto) for each eligible structure.

The above outline is offered to describe the general extent of services to be provided by the Consultant. This outline is not necessarily all-inclusive and the Consultant will include in the proposal any tasks or alternatives and services deemed necessary to satisfactorily complete the project. Consultants are encouraged to bring both expertise and creative ideas tested elsewhere and tailored to Wellesley to help the WHC design the approach that best suits the Project.

4.0 FORMAT OF FINAL DELIVERABLES

Each research report shall be printed single-sided on high quality paper with no read through, 8.5" x 11" format, and in color where a color photograph is used. The Consultant shall also provide the WHC with an electronic copy of each report, in both pdf format and Microsoft Word format, suitable for posting in the WHC online database. Completed research reports shall be provided to the WHC on a rolling basis, no less frequently than monthly, until the Project has concluded.

5.0 PRICE PROPOSALS

The Consultant shall submit an estimated cost summary, **not to exceed \$45,000** to provide the services required to fully completing the project. The Consultant must provide a breakdown of their cost estimate, either on an itemized basis (travel charges, hourly rates, responding to emails/phone calls, attending meeting, etc.) or on a per-report basis.

6.0 NON-PRICE PROPOSALS

Consultants must respond in writing to all requirements of this RFP in the order of the items listed below. The WHC reserves the exclusive right to select or reject the Consultant(s) that is

deems to be in the best interest to accomplish the project. Responses should reflect detailed consideration of the issues and opportunities presented. Any additional information that is believed to be relevant by the Consultant, but does not apply to the categories listed, should be added after the items listed below.

- a) **Statement of Project Requirements.** State in succinct terms the Consultant's understanding of what is required by this RFP. This includes the Consultant's understanding of the WHC's needs, the objectives and goals to be achieved, and the work involved.
- b) **Response to RFP.** Describe in narrative form the Consultant's approach and technical plan for accomplishing the work listed in section **3.0 Scope of Services**. The Consultant shall provide a detailed summary of how the project will be accomplished in accordance with above.
- c) **Similar Experience.** Provide details of experience and past performance of the Consultant in the areas of research on Wellesley history and American architectural history; archival research both in paper and digital form; conducting and presenting research for public consumption involving historic structures in general and historical date plaques in specific; and in taking photographs of buildings and structures suitable for archival reference. Provide summaries of similar projects completed for other individuals or organizations.
- d) **Staff Experience.** If the Consultant anticipates utilizing staff, please describe in detail the staff that will be involved in this project. This includes their names, education, experience, and the expected amount of time they will be working on this project.
- e) **Expected Time for Delivery.** Consultant shall discuss the estimated time anticipated to produce and deliver the research reports to the WHC, as well as the approach the Consultant will take to prioritize research reports for owners who have affirmatively sought a determination of date from the WHC for purpose of plaque eligibility.
- f) **Competing Commitments.** Consultants shall discuss the means by which adequate and timely attention to this engagement will be assured.
- g) **Local Preference.** Preference will be given to consultants in Wellesley, surrounding towns, or Massachusetts.
- h) **References.** Provide the names, titles, and telephone numbers of three persons who can substantiate the Consultant's summary of qualifications and experience relevant to this project. Indicate the linkage between the persons listed and the work mentioned in the "Similar Experience" section.

The WHC will use the following chart to rank each Consultant:

Statement of Project Requirements

Highly Advantageous	Consultant has a clear understanding of WHC's needs, objectives and goals to be achieved, and work involved. Content is well presented and easy to understand.
Advantageous	Consultant does not make clear to the WHC one or more details about the needs, objectives and goals to be achieved, and work involved for this project.
Not Advantageous	Consultant does not clearly understand the needs of this project.

Response to RFP

Highly Advantageous	Consultant details their process, from beginning to end, and addresses each area of concern in section 3.0 in a manner that is easily understandable. Consultant addresses potential areas of concern with a well thought-out plan.
Advantageous	Consultant addresses everything required in section 3.0.
Not Advantageous	Consultant does not address one or more items in section 3.0.

Similar Experience

Highly Advantageous	Consultant responds to all aspects of this section while providing summaries of past projects with much similarity to WHC's plaque research.
Advantageous	Consultant addresses everything required in section while providing some similar examples of past projects.
Not Advantageous	Consultant does not address all areas in this section or does not indicate comparable past projects.

Expected Time of Delivery

Highly Advantageous	The Consultant agrees to provide one or more reports to the WHC a month on this project as well as attend any monthly meetings required of the Consultant. Agrees to a two week turnaround time in order to respond to requests from residents who are possibly eligible for the plaque program.
Advantageous	The Consultant agrees to provide one report to the WHC each month on this project. Agrees to a four week turnaround time in order to respond to requests from residents who are possibly eligible for the plaque program. Agrees to a fixed five meetings with the WHC.

Not Advantageous	Is not either Highly Advantageous or Advantageous.
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Competing Commitments

Highly Advantageous	The WHC is thoroughly convinced that the Consultant's workload will allow working on the WHC's project to be a priority.
Advantageous	The Consultant has other projects it will be working on but the WHC concludes that the Consultant has allocated sufficient resources to complete the project in a timely manner.
Not Advantageous	The WHC is skeptical that the Consultant will be able to complete the project in a timely manner due to other current commitments.

Local Preference

Highly Advantageous	Consultant is located in Wellesley, Needham, Newton, Weston, Dover, or Natick.
Advantageous	The Consultant is in Massachusetts but not surrounding towns.
Not Advantageous	The Consultant is not in Massachusetts.

References

Highly Advantageous	Consultant provides three or more references that are able to provide examples of the quality of research the Consultant provided to them.
Advantageous	The Consultant provides up to two references that are able to provide examples of the quality of research the Consultant provided to them.
Not Advantageous	The Consultant provides no references OR one or more references was not favorable to the Consultant.

The WHC reserves the right to approve any and all consultants under subcontract. Selection will be made on criteria set forth in this RFP. A contract will be negotiated with the selected Consultant. Should agreement not be reached, the WHC would then negotiate with the remaining consultants in order of their ranking until a suitable agreement could be reached.

The WHC reserves the right to discontinue the selection process at any time prior to the awarding of a contract. There will be no reimbursement to any candidate, for any reason, if selection is terminated. The WHC will determine the proposal that is most advantageous within 90 days of the due date.

7.0 PRE-AWARD CONFERENCE

The selected Consultant shall attend a pre-award conference with the WHC within one month after contingent selection as the successful Consultant. Contract documentation and the selected Consultant's proposal shall be reviewed to assure precise understanding of contract requirements and to review the selected Consultant's proposal to accomplish all tasks.

8.0 PROPOSAL SUBMISSION

Price and non-price proposals must be in separate sealed envelopes as required by M.G.L. c. 30B. Please mark the price proposal with, "Price Proposal WHC Plaque Research" and the non-price proposal with "Non-Price Proposal WHC Plaque Research." Please make fourteen (14) copies of each document (one for each WHC board member and alternate member).

Consultants must also fill out the Certificate of Non-Collusion and Bidder Information Response form at the end of this RFP and submit a copy with each non-price proposal.

The Non-Price Proposals will be opened and available for examination at **3:00 p.m. on March 4, 2016**. The pricing information will be opened by the WHC after the Non-price proposal evaluation as required by M.G.L. c. 30B.

The WHC maintains the authority to wave any minor informalities pertaining to proposal submissions by Consultants.

9.0 TOWN'S REPRESENTATIVE

The Town's coordinator responsible for coordinating actions and for responding to all questions will be James Ryan. His contact information is as follows:

James Ryan, Finance & Budget Analyst
(T) 781-489-4308
(E) jryan@wellesleyma.gov

10.0 DUE DATE

Fourteen (14) copies of the proposals are required. Each proposal shall be limited to ten (10) pages, exclusive of information relative to a Consultant's qualifications and past experience, delivered on or before **March 4, 2016 at 3:00 p.m.** to:

James Ryan, Finance Department
Town Hall, 3rd Floor
525 Washington Street
Wellesley, MA 02482

10.0 OWNERSHIP OF INFORMATION PROVIDED

All information provided by the WHC to the Consultant and all material developed for this project shall be returned or delivered to the WHC before final payment and will not be used by the Consultant for other purposes or released to others without permission of the WHC.

The Consultant releases all rights to the deliverable research reports to the WHC and acknowledges that these research reports will be made available by the WHC in the public domain.

CERTIFICATE OF NON-COLLUSION

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

Signature of person signing proposal

Date

Printed Name and Title

Name of Business

Bidder Information Response
Historical Plaque Research

Legal Name of the Bidder: _____

Company Name: _____

Company Address: _____

City State Zip: _____

Company Web Address: _____

Company Telephone: _____ Company Fax number: _____

State of Incorporation (Date): _____

If the bidder is a partnership, give full names and addresses of all partners; and if an individual,
give residential address if different from business address.

Company Contacts - Required

Individual Submitting the Bid:

Name: _____ Title: _____

Mailing Address _____

Telephone: _____ Fax number: _____

Email Address: _____

Individual to be contacted about the Bid:

Name: _____ Title: _____

Mailing Address _____

Telephone: _____ Fax number: _____

Email Address: _____

Best Times to Contact: _____

49 WOODLAWN AVENUE



Year Built: 1879

Area of Lot: 21,057 sq. ft.

<u>List of Owners (with dates)</u>		<u>Book/Page</u>
06/28/1991	Karen V. Knudsen to Robert H. Dorin & Lesley C. Peebles	8970/646
09/20/1985	Jonathan B. Knudsen & Karen V. Knudsen to Karen V. Knudsen	6800/276
01/05/1981	William J. Cusack & Kathleen Cusack to Jonathan B. Knudsen & Karen V. Knudsen	5827/573
11/25/1973	Thomas C. Joseph & Patricia H. Joseph to William J. Cusack & Kathleen Cusack	5001/600
11/20/1972	Elizabeth B. Woodley (widow) to Thomas C. Joseph & Patricia H. Joseph	4891/175
10/13/1939	J. Walter Davis to George F. Woodley III & Elizabeth B. Woodley	2254/201
10/26/1935	Julia A. Engvall to J. Walter Davis	2089/148
10/26/1935	J. Walter Davis & Virginia Ralph Davis to Julia A. Engvall	2089/147
06/09/1920	Boston Safe Deposit & Trust Company (Executor and Trustee under the will of Frank L. Fuller) to J. Walter Davis & Virginia Ralph Davis	1458/85
04/___/1907	Edward W. Fuller, E. Mabel Fuller, Miriam J. Fuller, Fannie B. Welldon & Jeannette L. Bixby (heirs of Hezekiah Fuller Jr.) to Frank L. Fuller	1062/21

Includes site of 49 Woodlawn Avenue as 16 acre lot extending from Washington Street to railroad tracks

01/17/1843	Reuben Ware to Hezekiah Fuller Jr.	140/192
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Additional Information:

- 1879 Needham Town Report: Hezekiah Fuller owns one dwelling (185 Washington Street)
- 1880 Needham Town Report: Hezekiah Fuller owns two dwellings (185 Washington Street and 49 Woodlawn Avenue)
- “Mr. Hezekiah Fuller has built a neat house on Woodlawn Ave., adding greatly to the appearance of the vicinity.” – Needham Chronicle, July 19th, 1879.