

EXAMPLE SCOPE OF WORK – HISTORIC DISTRICT DESIGN GUIDELINES

The design guidelines project will be carried out in coordination with SHPO to ensure that the guidelines comply with the *Secretary of the Interior's Standards for Rehabilitation* and related technical guidance, including, for example, the *Secretary of the Interior's Guidelines on Sustainability for Rehabilitating Historic Buildings* and guidance provided in the National Park Service's Preservation Briefs. The City anticipates that the project will proceed according to the timeline outlined in the Work Schedule and include the following tasks:

- 1. RFP and Consultant Selection:** Once a grant agreement is executed with SHPO, the City will begin working on the Request for Proposals (RFP), which will be used to competitively select a consultant who meets the Secretary of the Interior's Professional Qualification Standards (36 CFR 61) for Architectural Historian and/or Historic Architect and possesses the following: (1) thorough knowledge of and familiarity with late-nineteenth through mid-twentieth century residential architecture; (2) thorough understanding of the *Secretary of the Interior's Standards*; (3) demonstrated experience in preparing sound design guidelines documents meeting professional standards; (4) expertise in digital photography and the creation of high-quality illustrations; and (5) a proven record of effective public engagement and outreach in association with preservation projects. The City will work closely with SHPO for review and approval of the RFP, as well as selection and approval of the consultant for the survey. The selected consultant will ultimately be responsible for all technical work associated with the project, including hosting public and HDC workshops; content development for the design guidelines; photography and creating illustrations; and design and layout of the document.
- 2. Consultant Kick-Off Meeting:** At the start of the project, the City, SHPO, and selected consultant will participate in a kick-off meeting to discuss the goals of the project, tasks to be completed, and anticipated timelines. Following the meeting, the City will invite the consultant to visit the historic districts or portions thereof to get a better understanding of the character of the districts to be addressed by the guidelines and to discuss specific topics of concern as well as past successes.
- 3. Internal Stakeholder Work Session(s):** At the outset of the project, the consultant will participate in the first of a series of working sessions with the City. It is anticipated that during this session the consultant will engage in discussions with the HDC, planning and zoning staff, and other relevant stakeholders from the Community Development Department that participate in or influence decisions related to activity in the historic districts. While the format and activities for this work session are to be determined by the consultant, the City anticipates that, at minimum, the consultant will engage with City stakeholders to discuss, for example, the strengths and weaknesses of current guidance, pros and cons of various formatting options, prioritization of needs for the new guidelines, and issues of particular concern to be discussed. The group also will discuss and finalize a plan for engaging public stakeholders in the process to ensure that all affected parties are represented in the project, thus working toward building an ethic of understanding for preservation and local historic district administration. At this time, the City will provide to the consultant existing documents that may be of use in preparation of the guidelines, including inventories and survey information, summaries of past discussions related to updating the guidelines, and the City's database of past COA decisions, which will facilitate an understanding of project trends witnessed by the HDC. It is anticipated that up to two (2) additional work sessions may be required during the course of the project to gather feedback from internal stakeholders on proposed updates and changes to the guidelines.
- 4. Initial Public Meeting:** The City and consultant will also coordinate to host a public meeting at the outset of the project, either as part of a regularly scheduled HDC meeting or a specially called meeting. Information on the meeting will be sent to property owners in the districts and related groups (e.g., neighborhood associations) and advertised on the City's website, on the community notice board at City Hall, and on social media. The purpose of this meeting will be to introduce the project to property owners and other stakeholders and to discuss the proposed methodology, goals of the project, and anticipated final products. This meeting at the outset of the project will also present an ideal opportunity for soliciting input from property owners as it relates to their use and understanding of the design guidelines and processes affecting their

properties. The consultant will prepare a PowerPoint presentation for this meeting and plan and execute relevant exercises and discussion activities.

5. Review of Existing Documentation and Completion of Photography: The consultant will collect and review pertinent information related to the historic districts in addition to the existing guidelines. Such information may include but is not limited to master plans, zoning information, property maintenance codes, histories, historical photographs, historic resource surveys and inventories, Study Committee reports, National Register nominations, and cartographic resources. The consultant will also complete digital photographic documentation of the character and context of the historic districts for use in preparing the updated guidelines. Such photography will include individual buildings, individual components and materials, streetscapes, and district-level characteristics such as spatial relationships, organization, and other trends that define the character of the districts.

6. Preparation of the Guidelines: In consideration of the collected materials and discussions with internal and external stakeholders, the consultant will develop a new design guidelines document. The final product will be a user-friendly handbook that will expand and elaborate on content covered in the current guidelines and incorporate information on additional preservation techniques and common design review topics; the updated guidelines also will identify and address (or reconcile) any conflicts between the guidelines and current building codes. An emphasis will be placed on accessible language free from unnecessary jargon and concepts that promote a consistent, defensible approach in consideration of the *Secretary of the Interior's Standards*. The narrative component of the guidelines will be complemented by diagrams, photographs, and other illustrations necessary to clearly convey the appropriate design principles, thus facilitating understanding on the part of end users, including the HDC, property owners, architects, contractors, and others. All photographs and illustrations used will be tailored to the character of the districts covered by the document. The updated document will include, at minimum:

- Introductory information including a table of contents, project acknowledgements, and summary of the districts covered by the guidelines;
- Summary of the role of the design guidelines and the importance of protecting the character of the historic districts;
- Explanation of the historic district commission and the review process, including timelines, how to apply for design review, differences between administrative review and HDC review, decisions that can be reached, appeals process, and other related guidance, as applicable;
- Identification of important concepts such as character-defining features, massing, scale, orientation, visibility, routine maintenance, rehabilitation, the *Standards*, and contributing and non-contributing status;
- Guidelines for existing buildings, to include discussion of appropriate treatments for features and materials such as masonry, wood, ornamental metal, windows, doors, roofs, foundations, exterior walls, porches, fences, retaining walls, utility and auxiliary equipment placement, and other such items as determined appropriate based on the characteristics of the districts;
- Guidelines for additions and new construction to include discussion of concepts such as placement, setbacks, massing, scale, styles, materials, and design of building components such as windows, doors, and roofs;
- Guidelines for demolition and relocation of buildings;
- Glossary of terms;
- District maps; and
- References.

The City anticipates that the consultant will submit the following for review as part of the project: Deliverable #1, proposed outline of the design guidelines document (25% submittal); Deliverable #2, first draft of the design guidelines, including illustrations (50% submittal); Deliverable #3, revised draft of the design guidelines, including illustrations (95% submittal); and Deliverable #4, final drafts of all materials (100% submittal). The consultant will be required

to address all SHPO comments and corrections at each review phase. The City and consultant will meet with SHPO, as necessary, after submission of the deliverables to discuss the comments prior to making adjustments for the remainder of the work.

- 7. Public Review Meeting:** Concurrent with development of the 95% submittal, the City and consultant will coordinate to host a follow-up public meeting to present the general content of the proposed document. The consultant will prepare a presentation that outlines the new document; identifies substantial changes made to the document, including new guideline components and substantively revised language in existing guidelines or altered processes; and presents samples of the new formatting of the document. Additional feedback from public stakeholders will be collected as part of this meeting and a subsequent 30-day review period and will be incorporated into the 95% submittal, as appropriate.
- 8. HDC Presentation:** In coordination with preparation of the 100% submittal, the consultant will assist the City in presenting the updated guidelines to the HDC. This presentation will provide a walkthrough of the new design guidelines and provide an opportunity for HDC members to ask questions about using the new document and applicability of certain guidelines.

It should be noted that the City anticipates that the project will end upon preparation of the 100% submittal and presentation to the HDC. Given the limited time afforded by the grant period, formal adoption of the updated design guidelines by the municipality will be completed outside of the grant project.