



REQUEST FOR PROPOSAL (RFP)

Date: September 8, 2022

To: Open Invitation to Professional Historic Preservation Consultants

From: Town of Sullivan's Island

RE: Historic preservation firm to conduct resurvey of all historic properties, districts and buildings to evaluate opportunities for new historic property designations

BACKGROUND AND RFP SUBMITTAL SCHEDULE

This Request for Proposals (RFP) invites responses from qualified, experienced professional historic preservation consultants to update the Town's historic resources survey. The project is funded, in part, by a grant from the National Park Service, administered by the South Carolina Department of Archives and History (SCDAH).

An update of the Town of Sullivan's Island Historic Resources Survey is essential in maintaining the Town's Historic Preservation Overlay District, which is designed to protect properties that have been deemed architecturally, archaeology, culturally or historically significant to the Island. The purpose of this project is to complete a comprehensive Town-wide survey of existing designated historic properties (within and outside of existing historic districts); review of all previous historic survey work; and evaluate existing non-designated properties for potential inclusion in the Historic Preservation Overlay District (HPOD). See enclosed Zoning Ordinance Article XI.

Questions concerning this RFP must be made via email per the schedule outlined below.

Responses to all submitted questions will be posted at:

www.sullivanisland.sc.gov/government/current-town-projects.

Issue date:	Thursday, September 8, 2022, 11:00 AM
Optional site visit:	Friday, September 16, 2022, 11:00 AM
Questions due:	Thursday, September 22, 2022, 11:00 AM
Submittals due:	Thursday, October 13, 2022, 11:00 AM

Inquiries/submissions to: Pam Otto
Town of Sullivan's Island
2056 Middle Street Sullivan's Island, SC 29482
Potto@sullivanisland.sc.gov
843-883-5744

PROJECT SCOPE, SCHEDULE AND COST

The survey will follow the requirements and standards of SCDAH in the *Survey Manual: South Carolina Statewide Survey of Historic Places* (SCDAH, revised 2018, with errata and updates 2019, 2020 and 2022), "*Guidelines for Local Surveys: A Basis for Preservation Planning* (National Register Bulletin 24)", "*Guidelines for Evaluating and Documenting Rural Historic Landscapes* (National Register Bulletin 30)", and "*Guidelines for a Statement of Historic Contexts* (SCDAH, revised 2003)", where applicable, and as discussed at the initial planning meeting. The project scope of work is to include the following required elements:

- 1) An initial planning meeting among representatives of the Town, SCDAH, and the Consultant shall be conducted before work begins to discuss the scope of work, methodology and schedule. This meeting may be held virtually.
- 2) The Consultant will synthesize existing research on the general historical development of the Town of Sullivan's Island and submit a historic context statement before beginning fieldwork. The historic context should summarize, synthesize and expand on contexts included in the National Register of Historic Places nominations for districts in Sullivan's Island, previous surveys performed by David Schneider Preservation, LLC, and other relevant published histories of Sullivan's Island. The historic context statement should also include discussion of areas of local history not discussed in the National Register nomination in Sullivan's Island, particularly the history of African Americans and Native Americans. The context will focus primarily on the developmental history of the area within the designated survey boundaries which includes the entire island.
- 3) The Consultant will conduct an intensive level survey, in accordance with the Survey Manual, of architecturally and historically significant buildings, structures, complexes, districts, and landscapes in the survey area that are at least 50 years old or will become 50 years of age within the next ten years and have integrity. The consultant will provide recommendations regarding individual properties and districts that may be eligible for listing in the National Register of Historic Places and for local designation. SCDAH will have final approval of National Register recommendations.
- 4) The Consultant will enter required information for all properties surveyed into a database in Microsoft Access format. SCDAH will provide the Consultant with a blank database file that includes all required data fields, tables, forms, and reports needed to compile and present survey data.
- 5) Location data for recorded properties will be provided to the Town and SCDAH and in the form of digital shape files that will be integrated with the Town's Geographic Information System (GIS) and SCDAH's ArchSite online GIS. SCDAH will provide a template for shape files.
- 6) The Consultant will provide written (by e-mail is acceptable) monthly progress reports to the Town and to SCDAH.

The Consultant will attend at least two (2) public meetings scheduled by the Town.

At the first meeting, the Consultant will introduce the project and receive public input to assist with understanding local history and identifying appropriate properties for survey. At the second meeting the Consultant will present the survey findings and recommendations to the public.

- 7) The Consultant will be required to submit all survey products in electronic format on a portable hard drive. All electronic files will be named according to file naming conventions determined by SCDAH that will be provided to the consultant before the project begins. Only the final report will be submitted in hard copy printed format in addition to a PDF copy. The following required products are to be submitted by the Consultant and divided between the City and SCDAH as listed: six (6) printed copies of the final report (including one unbound security copy), for the Town, two printed copies of the final report (including one unbound security copy) for SCDAH; two (2) sets of project maps in PDF format only (using county tax map parcel data for the base maps; one set each for City and SCDAH); two (2) sets of survey forms in PDF format only (each form will be an individual PDF file; one set each for the Town and SCDAH); two (2) sets of property photographs in JPEG or TIFF format only (one set each for Town and SCDAH); two (2) copies of the project database file (one each for Town and SCDAH).

ANTICIPATED PROJECT SCHEDULE (dates subject to change)

October 13, 2022	Deadline for submittal of proposals to Town.
November 4, 2022	Consultants notified of selection decision by the Town.
November 14-18, 2022	Consultant will have project start-up meeting virtually with Town and SCDAH.
January 9-13, 2023	First public meeting with Consultant will be scheduled sometime during this week.
February 23, 2023	Consultant will submit draft historic context statement not later than this date.
July 14, 2023	Consultant will submit draft report and draft survey data not later than this date.
September 30, 2023	Consultant will submit final report and final survey data and present at final public meeting not later than this date.

Town of Sullivan’s Island

The Town’s responsibilities include but are not limited to:

- a) Provide parcel data for base maps.
- b) Coordinate public meetings.
- c) Facilitate the Consultant’s access to local history sources and introduction to key local stakeholders.

RFP SUBMITTAL INSTRUCTIONS

Additional requirements are as follows:

- Proposers are solely responsible for ensuring that printed proposals arrive on time.
- **Each consultant MUST provide their submittal electronically as a PDF.**
- Additional details beyond the contents described above WILL NOT be considered.
- Faxed proposals WILL NOT be accepted.
- Late replies WILL NOT be considered.

Printed proposals may be mailed or delivered to:

Town of Sullivan's Island
2056 Middle Street
P.O. Box 427
Sullivan's Island, SC 29482
Attention: Pam Otto

CONTACT

For question and information call or email Pam Otto Human Resources Director at potto@sullivansisland.sc.gov or (843) 883-5744. Questions must be submitted via email. The deadline for written questions is Thursday, September 22, 2022, 11:00 AM.

SUBMISSION DEADLINE

Proposals must be mailed or hand-delivered to the Town of Sullivan's Island on or before Thursday, October 13, 2022, 11:00 AM, (EST). Proposals must be submitted in a sealed envelope and addressed to:

Town of Sullivan's Island
Attention: Pam Otto, *Human Resources Director*
2050 Middle Street
P.O. Box 427
Sullivan's Island, SC 29482.

For the purpose of identification, the envelope cover must contain the Proposer's name, address, and solicitation title - "Town of Sullivan's Island Historic Resources Survey Proposal." If proposal is sent by mail or commercial express services, the Proposer is responsible for actual delivery of the proposal to Town Hall before the deadline. All delivered proposals become the property of the Town. **Proposals submitted after the deadline will not be considered.**

The proposal must include a transmittal letter, one (1) original proposal clearly marked "Original," four (4) complete hard copies, and one (1) electronic copy of the proposal. The electronic copy must be submitted on a flash/thumb drive. The file format should be opened in Acrobat 10 (or lower edition) or Microsoft Word 2010 (or lower edition). PDF is preferred.

Expenses associated with proposal development and delivery are not reimbursable.

SELECTION PROCESS

The selection staff will evaluate and rank each proposal on the basis of the following criteria. The criteria are not necessarily listed in the order of importance.

- | | |
|---|-----|
| 1. Understanding of project | 10% |
| 2. Approach and Work Plan | 30% |
| 3. Management Plan and Timetable | 15% |
| 4. Project Team Qualifications and Experience | 35% |
| 5. Cost | 10% |

The Town of Sullivan’s Island reserves the right to reject any or all proposals, and to waive defects, technicalities, and/or irregularities in any submittal.

We may request phone or in-person interviews, or written response to specific questions to assist us in the selection of the most qualified firm/consultant. If in-person interviews are required, the person(s) responsible for performing the work are required to attend the interview.

Proposal, including pricing, should be valid for sixty (60) calendar days after proposal submission.

PROPOSAL CONTENT

To assure similarity among proposals and allow the evaluation team to easily compare proposals, the firm/consultant proposal must contain the following:

1. Title Page: Title page must include the title – “Town of Sullivan’s Island Historic Resources Survey Proposal” – proposers name, address, telephone, contact person with title, email, and date. The Proposer may incorporate colored pictures and/or artwork to highlight proposal presentation.
2. Table of Contents: The Table of Contents aids the evaluation process.
3. Transmittal Letter: The letter demonstrates the Proposer understands the project, the commitment to perform the work within the time period, why the Proposer believes its firm to be the best qualified to perform the work, and includes a statement that the proposal is a firm and irrevocable offer for sixty (60) calendar days.
4. Approach and Work Plan: The proposal must address, in depth, the Consultant’s plan to meet the requirements of each of the tasks and activities outlined in the Scope of Work. The work plan must discuss the staffing levels required to complete each task, as well as the relative effort that each member of the proposed project team will be devoted to the

project. The work plan must also include a task-by-task schedule of the time required to complete the project by September 30, 2023.

5. Management and Timetable: The Consultant must present a plan that clearly explains how it will manage and control all proposed activities and the resulting timetable. The firm must explain how the management and administrative processes will ensure that appropriate levels of attention are given so that work is properly performed and that milestones are met on a timely basis as proposed. This section should set forth beginning and ending dates, deliverable, and major milestones for a proposed timetable that coincides with the work plan.
6. Project Team Qualifications and Experience:
 - Identify person or persons assigned and their experience or brief resume.
 - List and provide a brief description of relevant or similar project experience with client names (no more than five).
 - References (no more than five).
 - Project Team qualifications and experience must meet the Secretary of the Interior's Professional Qualification Standards for History and Architectural History.
 - The minimum professional qualifications in history are a graduate degree in history or closely related field; or a bachelor's degree in history or closely related field plus one of the following:
 - At least two years of full-time experience in research, writing, teaching, interpretation, or other demonstrable professional activity with an academic institution, historic organization or agency, museum, or other professional institution; or
 - Substantial contribution through research and publication to the body of scholarly knowledge in the field of history.
 - The minimum professional qualifications in architectural history are a graduate degree in architectural history, art history, historic preservation, or closely related field, with course work in American architectural history; or a bachelor's degree in architectural history, art history, historic preservation or closely related field plus one of the following:
 - At least two years of full-time experience in research, writing, or teaching in American architectural history or restoration architecture with an academic institution, historical organization or agency, museum, or other professional institution; or
 - Substantial contribution through research and publication to the body of scholarly knowledge in the field of American architectural history.
7. Cost: Firm/consultant provides a lump sum cost reflecting hourly rate for the aforementioned services either as a flat-hourly rates or for each activity for person or

persons assigned to this project. A retainer fee is not to be included in response. The Town is committed to its reimbursement policy.

8. Statement of compliance 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, national origin, disability or age in programs assisted by the U.S. Department of the Interior.
9. Statement of compliance with the Debarment Certification, 43 CFR, Part 12, Section 12.510 and stating that neither the consultant nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.

The successful firm/consultant shall comply with all applicable federal, state, local governmental laws, rules, regulations, and orders in the performance of its duties under this proposal. Emailed proposals and questions should be submitted to Pam Otto, Town of Sullivan's Island at: potto@sullivansisland.sc.gov

GENERAL TERMS AND CONDITIONS

Communications

It is extremely important that all respondents are given clear and consistent information. Therefore, all respondents are required to submit any questions related to this project or RFP process via email.

Responses to all submitted questions will be posted on the Town website at: www.sullivansisland.sc.gov/government/current-town-projects. Questions concerning this RFP must be received via email per the schedule outlined on page 1. Inquiries received after this date will not be considered or answered. Respondents should not communicate with any Town department or employee during the submission process except as described above. In addition, no communications should be initiated by a respondent to any Town Official or persons involved in evaluating or considering the statement of qualifications.

Public Record

Your proposal is a public document under the South Carolina Freedom of Information Act (FOIA), except for information that may be treated as confidential as an exception to disclosure under the FOIA. After an award is made, copies of the proposal will be available for public review, under the supervision of the Town Administrator's Office from 8:30 am to 5:00 pm, Monday through Friday at 2050 Middle Street, Sullivan's Island, South Carolina.

Requirements

The successful proposers will comply with all instructions and shall perform services in a manner commensurate with the highest professional standards by qualified and experienced personnel.

Independent Contractor

The selected firm/consultant will be legally considered an independent contractor and neither the firm/consultant nor its employees will, under any circumstances, be considered employees of the Town, and the Town will be at no time legally responsible for any negligence or other wrong doing by the contractor or its employees.

Jurisdiction

This agreement shall be governed by the laws of the State of South Carolina.

Right of Rejection and Clarification

The Town of Sullivan’s Island reserves the right to reject any, and all, proposals and to request clarification of information from any proposer.

Request for Additional Information

Prior to the final selection, proposers may be required to submit additional information which the Town may deem necessary to further evaluate the proposer’s qualifications.

Denial of Reimbursement

The Town will not reimburse proposers for any costs associated with the preparation and submittal of any proposal, for any travel and/or per diem costs that are incurred.

Gratuity Prohibition

Proposer shall not offer any gratuities, favors, or anything of monetary value to any official, employee, or agent of the Town of Sullivan’s Island for the purpose of influencing consideration of this proposal.

Right of Withdrawal

A proposal may not be withdrawn before the expiration of 60 days from the proposal due date.

Right of Negotiation

The Town reserves the right to negotiate with the selected proposer the act terms and conditions.

Rights to Submitted Material

All proposals, responses, inquiries, correspondences, reports, charts, and other documentation relating to or in reference to this proposal, and submitted by proposers, shall become the property of the Town of Sullivan’s Island.

Basis of Award

Proposal will be evaluated based upon the information submitted in response to this bid proposal. Proposals shall be evaluated by staff. Staff may request additional information or clarity, which may include oral responses.

Assignment

The successful proposer will not sell, assign, transfer, or convey any contract resulting from this proposal, in whole or in part, without the prior written consent from the Town of Sullivan’s Island.

Lawsuits, Bribery

Proposer will disclose any record of pending lawsuits, criminal violations and/or convictions, etcetera, and shall not have conflicts of interest.

Conflict of Interest

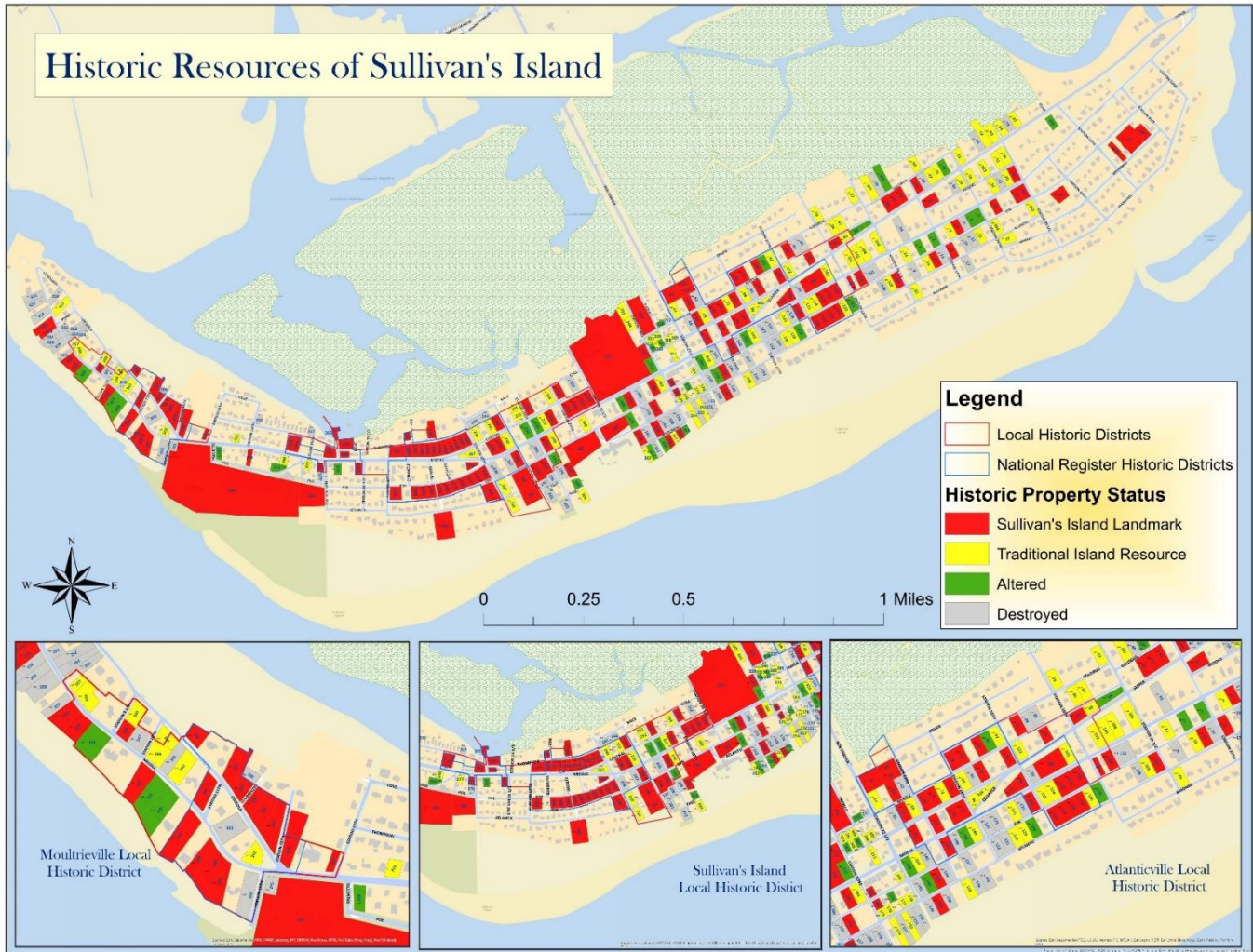
The proposer attests that they presently have no interest and will not acquire any interest, directly or indirectly, which would conflict in any manner or degree with the performance of the services hereunder. The proposer further attests that no person having any such known interest shall be employed or convey an interest, directly or indirectly, in the contract.

Business License

A business license is not required to submit a proposal. However, the selected firm/consultant and/or its agents under this proposal shall be required to obtain a business license before work can begin. For further information, contact the Town of Sullivan's Island Licensing Clerk, Jessi Gress at (843) 883-5727.

Indemnification

The selected proposer and its contractor shall indemnify and hold the Town, its employees, officers, officials, and agents free and harmless from and against any liabilities, losses, claims, demands, suits, judgments, causes of action and /or expenses of any kind, any injury or damages to any persons or to property resulting from the performance of the terms of the contract, including claims by any employees of the contractor or employees of the contractor's subcontractors, or claims by any third parties.



Town Website Links:

- National Register and local historic district maps ([Link to Map](#)).
- [Historic Designation List](#)
- [National Register District Nomination Forms](#)



ATTACHMENT A

Understanding of RFP Procedure, Terms and Conditions

This page to be returned with qualifications submission

I acknowledge that I have read and understand all procedures and requirements of the above reference RFP and have complied fully with the general terms and conditions outlined in the RFP.

Consultant Team: _____

Representative's Printed Name: _____

Representative's Signature: _____

Date: _____