CITY OF SAN GABRIEL
REQUEST FOR PROPOSALS
(RFP) RFP-20-04
HISTORIC CONTEXT STATEMENT

Release Date: July 9, 2020
Closing Date: August 5, 2020 at 5:00 p.m. PST
RFP Number: #20-04 Historic Context Statement
Contact Person: Mark Gallatin, AICP
Management Specialist
City of San Gabriel
425 S. Mission Drive
San Gabriel, CA 91776
626-308-2800 Ext. 4626 or by email at mgallatin@sgch.org

To be considered, three (3) bound copies and one (1) electronic copy of a proposal must be received by 5:00 PM PDT, August 5, 2020 in a sealed envelope plainly marked with the proposal title, RFP number, proposer name, and time and date of the proposal opening. Please send proposals to:

City Clerk
City of San Gabriel
425 Mission Dr.
San Gabriel, CA 91776

The City will not be responsible for late or lost proposals or accept proposals that fail to be delivered to the specified physical address by the specified date and time.
I. INTRODUCTION

The City of San Gabriel ("City") is requesting proposals from qualified consultants (Consultant) that meet the Secretary of the Interior’s Professional Qualification Standards for historian and/or architectural historian to conduct historic preservation analysis and prepare a Historic Context Statement (HCS) for the City of San Gabriel as a whole. The HCS is intended to be used as the basis for the completion of a historic resources survey in the future. The Consultant will not prepare the survey as part of this contract. This would be the City’s first HCS.

The HCS will use the National Register of Historic Places Multiple Property Submission (MPS) approach, with a context identifying major historical themes, associated property types, and registration requirements. The HCS will examine patterns of development from San Gabriel’s Spanish/Mission era to the mid-century era (1970). The HCS will help contribute to sound, informed decision making by providing a snapshot of how the city's mid-century resources have fared over the last fifty to seventy years. With the new HCS, San Gabriel can target mid-century properties that may be eligible for individual listing on local, state or national registers, and craft public education efforts to enlist residents' help in maintaining the character-defining features that make them attractive.

In keeping with the MPS approach, the HCS will identify historical themes significant in the history and development of the built environment in San Gabriel. The HCS will establish periods of significance for each theme; identify important associated property types, their character defining and associative features, integrity thresholds, and registration requirements. Context development will be informed by a focused reconnaissance-level survey and the review of previously conducted historic resource survey work, which will be provided to the selected consultant team by the City. Under the direction of the City’s Director of Community Development, the consultant will provide the range of expertise necessary to carry out the HCS. The successful consultant shall also have the resources to provide cost effective and timely services, including providing outstanding customer service to the City and its related clients. All work shall be performed and deliverables produced in accordance with Secretary of the Interior’s Standards for Preservation Planning, Identification, Evaluation and Registration when such standards are applicable, and the Office of Historic Preservation's instructions.

This project will be a joint effort led by the selected consultant team, City staff, the Historic Preservation and Cultural Resources Commission, the San Gabriel City Council, and the preservation community and will include participating in community outreach and public hearings to discuss survey results and take questions from the Commission, City Council, and public. It is vital that the consultant meets all of the required deadlines, which are outlined in the "Anticipated Schedule for RFP" section of this RFP. The City anticipates the process to take approximately twelve months. The City plans to enter into an agreement with the selected consulting firm based on negotiated scope of work and proposed fee. The scope and fee do not include any CEQA analysis or any CEQA work that may be required as part of this project.
I. CURRENT HISTORIC PRESERVATION POLICY AND EFFORTS

San Gabriel first established itself as a leader in historic preservation in 1965, when it became only the second city in the county, following Los Angeles, to adopt a historic preservation ordinance. During the ensuing half-century, the City has designated and protected local landmarks and completed historic resource surveys for four portions of the city, ranging from the Mission District to commercial architecture along Valley Boulevard.

San Gabriel offers preservation incentives alongside its preservation protections, including the popular Mills Act property tax abatement program and fee reductions for qualified historic preservation projects. To foster and recognize local efforts in historic preservation, San Gabriel offers the annual Martin E. Weil Award to honor notable preservation projects, organizations, or individuals.

The City of San Gabriel has a partner in its preservation efforts with the San Gabriel Historical Association (SGHA). In 1976, the committee formed to celebrate the nation’s bicentennial became the historical committee and the San Gabriel Historical Association was the result. More information about the SGHA can be found on their website: https://www.sghistorical.org/.

The Los Angeles Conservancy, a non-profit advocacy and education organization, published their second edition of a “preservation report card” in March 2014. The report card grades each of the 88 cities within Los Angeles County on their historic preservation programs. San Gabriel received a B grade. https://www.laconservancy.org/resources/report-card/report. We anticipate the grade to rise in the future, as the City begins to implement or fulfill key aspects of its expanded historic preservation program.

General Plan Policy:

The City’s General Plan includes a Cultural Resources chapter with the following Goals and Targets regarding historic preservation:

GOAL 11.1: Preserve and protect valuable but threatened resources.

Target 11.1.1: Preserve existing historically significant structures, i.e., pre- and post-statehood artifacts, adobes, Mission-era outbuildings and structures.

Target 11.1.3: Use the principles and practices of land use planning, historic preservation, archaeology, art history, anthropology and history to promote preservation and adaptive reuse of cultural resources.

GOAL 11.2: Celebrate San Gabriel’s connection to the culture of the Tongva People.

Target 11.2.3: Inventory structures, paleontological sites, archaeological sites, cultural landscapes, artifacts and documents in San Gabriel and institutions associated with the Tongva/Gabrielino people.

GOAL 11.6: Need to conserve and protect.

Target 11.6.1: Foster a neighborhood conservation ethic.
Target 11.6.2: Ensure that other community policies and plans should complement community conservation goals.

GOAL 11.7: Create a database documenting the breadth and wealth of San Gabriel’s cultural resources.

Target 11.7.1: Document and recognize buildings and structures that have historic value.

Target 11.7.3: Partner with community organizations such as the San Gabriel Historical Association, California Preservation Foundation, Los Angeles Conservancy and Pasadena Heritage.

GOAL 11.9: Preserve and protect our cultural landscapes from damage and degradation.

Target 11.9.1: Protect and preserve bridges and other engineering features of merit.

Target 11.9.2: Protect and preserve historic and cultural landscapes.

Previous Surveys

Over the course of the last two decades, work on six historic resource surveys has been done. This represents a review of close to 700 properties in the City. None of the surveys, however, met the requirements for an historical resource survey as contained in Section 5024.1(g) of the California Government Code. In 2003, during the preparation of the Valley Boulevard Specific Plan, preservation architect Martin Weil did a windshield survey of neighborhoods in the plan area. Similarly, he completed one in 2004 which became part of the Mission District Specific Plan. The 2004 General Plan also contained a map showing historic and cultural resources. Finally, in 2006, a team of students from Cal Poly Pomona, led by Professor Anna Maria Whitaker, surveyed four residential neighborhoods: Northwest San Gabriel, the Country Club, San Gabriel Village and the area south of Valley Blvd. DPR forms were created by the students as part of this process. Although, not all the DPR forms were verified, the database complied through this process provides a good baseline of information for these neighborhoods. The data from previous surveys is available in a spreadsheet format as well as electronic copies of the draft DPR forms from the 2006 survey. A sample of a DPR from the 2006 survey is attached.

Demolition and Neighborhood Compatibility

On October 6, 2015, the City Council adopted Urgency Ordinance No. 621-C.S. placing a moratorium on the demolition of single-family homes and the development of new second stories in the R-1 (Single-Family Residence) zone to protect the City’s older neighborhoods, address mansionization concerns and put new policies regarding demolition and replacement projects in place. On October 3, 2017, City Council approved Urgency Ordinance No. 639-C.S., adopting new development standards for properties in the R-1 zone and a new review process for development in the R-1 zone. New second stories are processed as SPRs and require City Architect review before Design Review Commission (DRC) consideration.
II. AVAILABLE RESOURCES

<table>
<thead>
<tr>
<th>Document/Source</th>
<th>Location</th>
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<tbody>
<tr>
<td>City of San Gabriel General Plan</td>
<td><a href="http://sangabrielcity.com/DocumentCenter/View/733/GENERAL-PLAN-FOR-WEB?bidId=">http://sangabrielcity.com/DocumentCenter/View/733/GENERAL-PLAN-FOR-WEB?bidId=</a></td>
</tr>
<tr>
<td>Historic Preservation Ordinance</td>
<td><a href="https://codelibrary.amlegal.com/codes/sangabriel/latest/sangabriel_ca/0-0-0-25627#rid-0-0-0-31005">https://codelibrary.amlegal.com/codes/sangabriel/latest/sangabriel_ca/0-0-0-25627#rid-0-0-0-31005</a></td>
</tr>
<tr>
<td>San Gabriel Historical Association</td>
<td><a href="https://www.sghistorical.org/">https://www.sghistorical.org/</a></td>
</tr>
<tr>
<td>Ramona Museum of California History</td>
<td><a href="http://www.ramonaparlor.org/">http://www.ramonaparlor.org/</a></td>
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III. PROJECT NEED

Local Setting and Regulatory Framework

As a Mission City with strong Spanish influences combined with a historic downtown and surrounding residential neighborhoods that developed in the early 1900’s, the City of San Gabriel is rich in historical resources that span a substantial time frame. Other influences in the City’s development pattern, such as development before and after WWII, have not been fully described or explored. In particular the City needs to be assured that the context statement will lead to future surveys that are consistent with the Secretary of the Interior’s Standards for the Treatment of Historic Properties, and the accompanying Guidelines for historic buildings.

San Gabriel’s Historic Preservation and Cultural Resources Ordinance dates to 1965, when it became only the second such ordinance to be adopted in Los Angeles County. The ordinance was comprehensively updated in 2017 and a Historic Preservation and Cultural Resources Commission (HPCRC) was created.

The HPCRC has identified the need for a historic context statement as a priority and commissioners are interested in assisting with its preparation. With a formal historic context
statement, the City will be better equipped to assist the citizens of San Gabriel and developers by providing a greater level of consistency regarding identification and classification of historic resources. By adopting an HCS, the City will be better positioned to identify and preserve its historic resources, as well as to forward its own preservation policies and objectives. A comprehensive HCS will strengthen the tools available for the identification, management, protection, and interpretation of historic resources.

The Need for an HCS to Guide Future Surveys

One of the most important components of the HCS will be establishing a multiple-property framework for identifying and evaluating individual resources and historic districts.

Needs in the Historic Context Statement

- **Framework for Surveys**: San Gabriel needs an HCS that facilitates the evaluation of individual properties by comparing them with resources that share similar physical characteristics and historical associations throughout the City.

- **Criteria & Thresholds**: San Gabriel needs an HCS that will explain the evaluation criteria, integrity thresholds, and registration requirements for properties qualifying under each significant contextual theme.

- **Historic Resources of the Recent Past**: In addition to addressing the built environment from the 1770s to the 1930s, the City's HCS needs a thematic section that describes the mid-century modern era properties including: descriptions of associated property types and subtypes and their registration requirements, significant architectural attributes and styles, character-defining features, registration requirements, and integrity thresholds.

- **Other Needs**: The HSR should address the following additional issues:
  - A discussion about how to use the document for the public's understanding, for Commissioner's use, and future surveyors;
  - An explanation about how to Apply the National Register Criteria for Evaluation;
  - User-Friendly format with tables, bulleted lists, graphics, and other illustrations as appropriate;
  - An explanation about how to address properties that may be significant under more than one context.

HCS Expectations

The achievement of a robust HCS will aid in the future identification of the City's historic resources in a way that is consistent with State and Federal standards. The content and user-friendliness of a new HCS will assure that the public has access to a complete understanding of the framework used to identify the City's historic resources. It will give property owners and business people the information they need to better understand which alterations are considered acceptable (based on its connection within context) and will help the HPCRC evaluate proposals for alterations to properties considered historic resources. This HCS will help
the City take the first step towards developing its first complete survey in the future. It will help assess the integrity of buildings throughout the city and identified neighborhoods, including mid-century buildings.

A. Other Information

1. Expenses
   There is no expressed or implied obligation for the City to reimburse responding firms for any expenses incurred in preparing proposals in response to this request.

2. Federal Non-Debarment, Non-Discrimination, Conflict of Interest
   a. The selected firm must not be on the federal debarred list.
   b. The selected firm must comply with all local, state, and federal laws relating to non-discrimination.
   c. The selected firm must not have any real or apparent conflicts of interest either with the City, City staff or City Councilmembers or with any of its own vendors relating to this proposal.

3. Proposals Submitted
   a. Materials submitted by respondents are subject to public inspection under the California Public Records Act (Government Code Sec. 6250 et seq.), unless an exemption applies.
   b. The City reserves the right to retain all proposals submitted and to use any ideas in a proposal, regardless of whether that proposal is selected. Submitted proposals are not to be copyrighted.
   c. Submission of a proposal indicates acceptance by the firm of the conditions contained in this Request for Proposals, unless clearly and specifically noted in the submitted proposal and confirmed in the contract between the City and the firm selected. The Consultant by submitting a response to this RFP waives all right to protest or seek any legal remedies whatsoever regarding any aspect of this RFP. The City may choose to interview one or more of the firms regarding this RFP.
   d. No individual or business entity of any kind shall be allowed to make or file, or to be interested in more than one proposal, except an alternative proposal when specifically requested; however, an individual or business entity that has submitted a sub-proposal to a proposer submitting a proposal, or who has quoted prices on materials to such proposer, is not thereby disqualified from submitting a sub-proposal or from quoting prices to other proposers submitting proposals.

4. Rights of City
   This RFP does not commit the City to enter into a contract, nor does it obligate the City to pay for any costs incurred in the presentation and submission of proposals or in anticipation of a contract.
The City reserves the right to amend the RFP prior to the final proposal submittal date. Any amendments will be issued to all prospective firms who have registered their intent to respond with the City and will also be posted on the City’s website.

The City may, but need not, request additional information or clarifications from a prospective firm. Such request will establish a date by which the firm may submit a supplement to its proposal. Any supplement received by the date established will be deemed an integral part of the firm’s proposal.

The City reserves the right to:
   a. Make a selection based on its sole discretion / evaluation of proposals;
   b. Reject any or all proposals prior to the execution of the contract(s), with no penalty to the City of San Gabriel;
   c. Waive non-material irregularities or information in the RFP;
   d. Accept or reject any item or combination of items;
   e. Modify or cancel the RFP;
   f. Remedy technical errors in the RFP process;
   g. Accept other than the lowest offer;
   h. Waive minor irregularities or technical deficiencies in submitted proposals.
   i. Postpone proposal openings for its own convenience.
   j. Change the RFP schedule or issue addenda to the RFP at any time.
   k. Cancel or reissue the RFP.
   l. Retain all proposals for a period of 60 days for examination and comparison.
   m. Determine the competence and responsibility, professionally and/or financially, of proposers.
   n. Negotiate with more than one firm should negotiations with the selected firm be terminated or to negotiate with more than one firm simultaneously.
   o. Void the proposal response and eliminate the firm(s) from further consideration for any material misrepresentations made by the firm(s).

B. Contract Performance

1. Ability to Perform
   The Firm warrants that it possesses, or has arranged through subcontracts, all capital and other equipment, labor, materials, and licenses necessary to carry out and complete the work hereunder in compliance with any and all federal, state, county, city, and special district laws, ordinances, and regulations.

2. Work Delays
   Should the Firm be obstructed or delayed in the work required to be done hereunder by changes in the work or by any default, act, or omission of the City, or by strikes, fire, earthquake, or any other Act of God, or by the inability to obtain materials, equipment, or labor due to federal government restrictions arising out of defense or war programs, then the time of completion may, at the City's sole option, be extended for such periods as may be agreed upon by the City and the Firm. In the event that there is insufficient time to grant such extensions prior to the completion date of the contract, the City may, at the time of acceptance of the work, waive liquidated damages that may have accrued for failure to complete on time, due to any of the above,
after hearing evidence as to the reasons for such delay, and making a finding as to the causes of same.

3. Inspection
The Firm shall furnish City with every reasonable opportunity for City to ascertain that the services of the Firm are being performed in accordance with the requirements and intentions of this contract. All work done and all materials furnished, if any, shall be subject to the City's inspection and approval. The inspection of such work shall not relieve Firm of any of its obligations to fulfill its contract requirements.

4. Audit
The City shall have the option of inspecting and/or auditing all records and other written materials used by Firm in preparing its invoices to City as a condition precedent to any payment to Firm.

5. Copies of Reports and Information
If the City requests additional copies of reports, drawings, specifications, or any other material in addition to what the Firm is required to furnish in limited quantities as part of the work or services under these specifications, the Firm shall provide such additional copies as are requested, and City shall compensate the Firm for the costs of duplicating of such copies at the Firm's direct expense.

6. Attendance at Meetings and Hearings
As part of the work scope and included in the contract price is attendance by the Firm at up to 5 (or more) public meetings to present and discuss its findings and recommendations. Firm shall attend as many "working" meetings with staff as necessary in performing work scope tasks.

Following selection of the successful consultant, contract negotiations will include a review and approval by the City Attorney, who may ask for specific modifications.

II. ANTICIPATED SCHEDULE FOR RFP

The following is the anticipated schedule of key dates for the proposal process. The City reserves the right to modify the schedule and will make every effort to provide reasonable notice to proposers in the event of schedule changes.

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
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<tbody>
<tr>
<td>RFP issued</td>
<td>July 1, 2020</td>
</tr>
<tr>
<td>Deadline to submit written questions</td>
<td>July 22, 2020</td>
</tr>
<tr>
<td>Responses to questions issued</td>
<td>July 31, 2020</td>
</tr>
<tr>
<td>Proposals due</td>
<td>August 5, 2020 by 5:00 pm PDT</td>
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<tr>
<td>Interviews</td>
<td>Week of August 24, 2020</td>
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<tr>
<td>Contract approved by City Council</td>
<td>September 15, 2020</td>
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<tr>
<td>Project kickoff</td>
<td>September 21, 2020</td>
</tr>
<tr>
<td>Review existing information</td>
<td>September-October 2020</td>
</tr>
<tr>
<td>Introduction to HPCRC</td>
<td>October 2020</td>
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<tr>
<td>Conduct public workshop/outreach</td>
<td>November 2020</td>
</tr>
<tr>
<td>Prepare HCS outline (HPCRC meeting)</td>
<td>December 2020 - January 2021</td>
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There will be no pre-bid meeting for this proposal. Any questions regarding this RFP must be sent by 5:00 pm on Wednesday, July 22, 2020. Requests for clarification/questions received after this deadline will not be answered. Such requests for clarification should be kept to a minimum due to the short response time for proposals. Clarifications/questions regarding the RFP should be directed in writing via email or letter only to the designated contact person. Only questions that have been resolved in writing will be binding. Telephone communications with City staff are not encouraged, but will be permitted. Oral and other interpretations or clarifications will be without legal or contractual effect. Questions and responses will be made available to all potential proposers. All proposals will be opened and declared publicly. Proposers or their representatives are invited to be present at the opening of the proposals.

### III. DESCRIPTION OF THE CITY

#### A. The City of San Gabriel

San Gabriel is located approximately 10 miles northeast of the City of Los Angeles and was incorporated in 1913 as a general law city which operates under the council-manager form of government. The City Council is comprised of five members who are elected at large serving a staggered term of four years. The City provides a full range of municipal services including police and fire protection, engineering and planning, street maintenance, traffic control, code enforcement, parks and recreation services, and general administrative activities. Today, San Gabriel is an ethnically and socio-economically diverse city. It is a built-out community and, as a result, new development is almost entirely adaptive reuse, intensification, and replacement. It has not experienced significant population growth since the 1990s, a decade during which the City grew by 7.3 percent and added nearly 2,700 new residents. During the 2000s, San Gabriel’s population increased by only 0.3 percent. The City encompasses 4.1 square miles with a population of 41,255 and is developed with a mix of residential and commercial uses, as well as limited institutional, industrial and parkland uses.

For a small city, San Gabriel has long played an outsized role in the history of Southern California. Known as the “Birthplace of the L.A. Region”, San Gabriel was the starting point for 44 settlers or “pobladores” who walked nine miles west and founded the city of Los Angeles. San Gabriel first demonstrated its commitment to preserving its history with the adoption of a historic preservation ordinance in 1965, only the second city in Los Angeles County to do so. This ordinance was completely updated and expanded in 2017 and is supplemented by a Cultural Resources chapter in the City’s General Plan.

#### B. The Planning Division Staff:

The Planning Division is one of four divisions of the Community Development Department, which consists of: Planning, Building, Neighborhood Improvement Services (code enforcement) and Economic Development and is staffed with a Planning Manager (currently vacant), a Senior Planner, an Associate Planner (currently vacant), an Assistant Planner and a part-time intern.
C. The City’s FY 2019-20 operating expenditure budget for all funds combined is approximately $67.0 million (including transfers between funds), including $41.6 million in the General Fund.

D. City Contact
The consultant’s principal contact with the City will be Mark Gallatin, Management Specialist. Mr. Gallatin will coordinate the day-to-day assistance to be provided by the City to the consultant.

IV. SCOPE OF SERVICES REQUESTED:

SCOPE OF SERVICES TO BE PERFORMED

The City of San Gabriel is seeking proposals from qualified consulting firms to prepare a comprehensive Citywide Historic Context Statement that will include all phases of the City’s development from the Spanish/Mission era through Mid-Century development. Work will commence on September 21, 2020 and end on September 21, 2021. Adopting the Citywide HCS will be a joint effort of the selected consultant team, City staff, the Historic Preservation and Cultural Resource Commission, the City Council and interested citizens and stakeholders. The consultant will be required to work closely with the Commission and members of the Planning staff. The results of the project will be presented to the Historic Preservation and Cultural Resource Commission and City Council. The proposal should include a conceptual timeline for the completion of this project that address all the components in the Scope of Work.

The activities/tasks for the consultant would include the following:

1. Review existing surveys and plans;

2. Research existing City documents and available primary and secondary resources to help build the background for the context statement;

3. Provide information to assist with a web page on the City’s website to describe activity and invite public comments;

4. Consult with the San Gabriel Historical Association, neighborhood groups, and other interested citizens groups and professionals to gather information and build awareness and consensus for project approach and objectives;

5. Conduct a public workshop to engage interested citizens, neighborhood groups and local professionals from the development and preservation community;

6. Prepare a project outline and bibliography;

7. Prepare draft HCS and distribute to City staff;

8. Provide content for the City website, describing preliminary findings of the HCS and inviting public comment;
9. Attend four public meetings of the Historic Preservation and Cultural Resources Commission, and one City Council meeting to answer questions as the HCS moves through the approval process; and

10. Incorporate comments from City staff; prepare final HCS.

**POLICY DOCUMENTS**

The selected consultant will meet with City staff to establish project goals and objectives and confirm the project schedule. Using the City’s existing lists of potential and designated historic resources, General Plan policies, current historic preservation ordinance, demolition and neighborhood compatibility ordinances, data from previous incomplete survey projects, and information provided by local historians as the starting point, the consultant shall prepare a historic context statement for the City of San Gabriel using the OHP Preferred format for Historic Context Statements.

The historic context statement will identify the important themes relevant to the history and development of the built environment of San Gabriel based on neighborhood research, interviews and survey results. The context statement will establish periods of historical significance for each of the important themes, identify important associated property types with their character defining and associative features, and establish evaluation criteria and integrity thresholds sufficient to provide a framework for identifying and evaluating individual resources and historic districts for the National, California, and local registration programs.

Context development will be informed by a reconnaissance survey as well as previously conducted historic resource surveys, and will establish priorities for future survey work. The reconnaissance survey shall include all structures 45 years old or older and any newer structures that may be significant under the identified themes in the historic context statement. The contribution of individual structures to a potential historic district or thematic grouping shall also be identified, photographed and evaluated. All survey work will meet State Office of Historic Preservation standards. Each surveyed property or group of properties will be evaluated and categorized by theme(s), as appropriate. Evaluation will be based on National Register, California Register and local criteria. The final work product will be a historic context statement.

All work shall be performed and deliverables produced in accordance with Secretary of the Interior’s Standards for Preservation Planning, Identification, Evaluation and Registration when such standards are applicable.

The consultant shall meet the Secretary of the Interior’s Professional Qualifications for historian or architectural historian as set forth in 36 CFR Part 61, Appendix A. The historic context statement will need to be consistent with standards and guidelines established by the Office of Historic Preservation (OHP). The effort will result in a document containing a complete historic context statement to identify significant periods and the types of development associated with each period.
The resulting document should include a discussion of how the survey findings will be incorporated into local planning as well as identify potential “next steps”. The context statement will set the stage for the completion of a future survey(s) and will help determine appropriate resources that will need to be allocated in the future.

OUTREACH AND TRAINING

Public outreach is integral to a successful historic preservation program. In San Gabriel we utilize newsletters, newspaper ads, mailers, public workshops within neighborhoods, web pages, social media, and last but not least, noticed public hearings as part of our outreach efforts. Since longtime San Gabriel residents are often helpful in identifying local history, we hope to engage residents as we begin to formulate a draft context statement. The City and consultant will work with, neighborhood groups, and local professionals to ensure that the context statement includes a broad spectrum of local knowledge. The final product will be available on the City’s website, available as a document at the City, the public library, and given as resource materials to all City decision makers.

The selected consultant is responsible for recommending an outreach program as part of the work scope, including a kick-off meeting with the public. This step is imperative to ensure that the survey’s approach and process is inclusive. The program should facilitate public input to engage interested parties including members of the public, property owners, the Spanish-speaking community, the Chinese-speaking community, community stakeholders (SGHA and others), City staff, Commissioners (Historic Preservation and Cultural Resources), and City Council.

The selected consultant will provide training for Planning staff and the Historic Preservation and Cultural Resources Commission on how to utilize the HCS in future policy development and during project review.

LISTING ON CITY OF SAN GABRIEL QUALIFIED PRESERVATION CONSULTANT’S LIST

This is not a work product per se, but rather an indication of interest in being included on a qualified consultant’s list to conduct historic structure reports pursuant to the City’s demolition review regulations. Additionally, a consultant may solely request to be added to the qualified consultant’s list without submitting a proposal pursuant to this request.

DELIVERABLES

The final product is a comprehensive historic context statement document that outlines the overall pattern of development of the City and profiles particular periods of significance along with example resources from each of the periods. The context statement will be used to assist with the identification of historic resources through future historic resource surveys and defining boundaries of historic districts. The following deliverables include:

- Community outreach strategy
- Draft Historic Context Statement for the City of San Gabriel and reconnaissance survey results (10 hard copies, one electronic copy (CD-ROM or flash drive)) (City to review copy)
- Final Historic Context Statement (15 copies, one electronic copy (CD-ROM or flash drive)) (final version endorsed by HPCRC and adopted by Council)
Note that the number of requested copies is preliminary and may be adjusted as necessary. Efforts will be made to minimize the use of paper throughout the process. All work products being presented to the public must be provided in both paper and electronic formats. Electronic files must include all graphics and exhibits, and be formatted to allow posting on City’s website.

The final document will be user-friendly in terms of its layout, including graphics, illustrations, and formatting and will be organized into distinct sections. The first four sections are explanatory including:

1) An introduction that provides background information about the project and how to use the document;

2) The City's location and physical relationship to its neighbors;

3) Study methods detailing the means used to develop the Historic Context Statement; and

4) Criteria for evaluation, discussing federal, state, and local criteria of significance and integrity requirements. The next section will contain a chronology of the City's development recounting the history of San Gabriel from the Spanish/Mission era to 1970. The remaining sections would then be thematically organized with discussions of important historical themes including:

5) Architectural Character and associated property types including character-defining features, registration requirements, and integrity thresholds.

6) A section dedicated to Architects, Builders, and Developers of San Gabriel, a special section to include brief synopses of the careers of people who shaped the city's built environment.

7) "References" section that lists sources consulted in its development and any additional references that might aid future surveyors.

V. BASIS FOR COMPENSATION

A. The City will receive competitive proposals from firms having specific experience and qualifications in the areas identified in this RFP. Under competitive negotiation procedures, the terms of the service contract, the price of the service, the method of service delivery, and the conditions of performance are all negotiable. A negotiated contract will be awarded to the firm that best meets the proposed needs at a reasonable price, not necessarily at the lowest price.

The City will pay the consultant for those services described in Section IV (scope of work) the not-to-exceed amount ( $ 4 0 , 0 0 0 ) contained within the agreement. For additional services required after the inception of the agreement, written approval by the City is
required in advance of such services being rendered, for which a fee will be paid based on the firm’s quoted hourly rates.

B. The firm may submit itemized bills for their services at the end of each calendar month period in which accumulated unbilled charges exceed $1,000.00. The City will promptly review and act upon these bills.

PART 2 - PROPOSAL REQUIREMENTS AND INFORMATION

I. PROPOSAL REQUIREMENTS

Respondents are asked to submit one electronic copy and three (3) copies of their proposals in an 8 ½” x 11” format, in sufficient detail to allow for a thorough evaluation and comparative analysis.

The following minimum information should be provided in each proposal and will be utilized in evaluating each proposal submitted. To expedite the evaluation of proposals, the proposal must be no longer than 20 pages (not including resumes). The content and sequence of the information contained in each copy of the proposal shall be separated into sections as follows:

Proposal Format and Contents

A. **Cover Letter** - Provide an original cover letter signed by an officer authorized to contractually bind your firm. The cover letter should also include: the identification of the firm, including the name, address and telephone number of the firm; proposed working relationship among the firm and any subfirm(s), if applicable; name, title, address and telephone number of a contact person during the proposal evaluation period; the name and contact information for the individual who will serve as project manager; and, a statement to the effect that the proposal shall remain valid for a period of not less than ninety (90) days from the date of submittal. Include a brief understanding of the work to be done and commitment to perform the work. Describe why you are best qualified to perform the requested services.

B. **Firm Qualifications** - Provide a brief overview of the firm(s) performing historic preservation and survey services, their qualifications in working with various municipal departments, commissions, elected officials, and community members, and a description of any special services, expertise, or abilities that the firm(s) can utilize in the performance of the services described herein. The selected consultant must be able to meet the Secretary of the Interior’s Professional Qualification Standards outlined in 36 CFR Part 61, Appendix A. In addition, key project personnel should have the following credentials:

- A graduate degree in historic preservation (or a closely related area of study) and 8 to 10 years of experience in historic preservation and the identification, evaluation, and documentation of historic resources;
- The prospective consultant must demonstrate experience in preparing historic context statements following the MPS approach;
• Experience working in San Gabriel or adjacent communities is preferred.
• Experience preparing Historic Context Statements on historic resources of the recent past is preferred.

C. **Firm Experience** - Provide examples of the last three (3) completed projects demonstrating the consultant’s current historic preservation experience working with municipalities or other public agencies. Provide three (3) client references applicable to the scope of services. Include contact names, telephone numbers and e-mail addresses.

D. **Project Leadership** - Designate the individual who will be the primary point person with City staff and oversee the scope of work. Describe the Project leader’s qualifications, outline their primary responsibilities, and provide examples of relevant projects of similar scope and size that demonstrate the Project leader’s ability to successfully oversee projects that are completed on time and within the budget.

E. **Project Team** - The Project Team should include Historic Preservation professional(s) and/or historic resources survey specialist(s). Provide an organization chart that identifies the key members of the project team, their firm, title, and assigned role within the project team. Briefly summarize the major responsibilities of each team member and the primary tasks they will be working on. Include resumes for all team members that highlight relevant projects and qualifications to complete the tasks assigned. The City of San Gabriel reserves the right to accept the proposal team in full or to restructure teams as necessary for the best possible result.

F. **Sub-Consultants** - List all sub-consultants proposed for this project and include their qualifications and specific responsibilities.

G. **Approach and Work Plan** - Provide a written narrative describing the consultant team’s approach and work plan for completing the scope of work. On a per task basis, the narrative should identify the designated team member(s) responsible for completing the work, deliverables, public outreach program, and the timeframe for completion. Include an explanation of any division of work proposed between the consultant and the City.

H. **Fees** - Provide a fee proposal for the Scope of Work that outlines the number of hours and fee associated with each task (and subtask) and provide a list of hourly rates for all team members. All prices should reflect “not to exceed” amounts per item. The total cost for completing the Scope of Work shall not exceed $40,000.

I. **Ownership of City-Related Documents** - All proposals, inquiries, responses, or correspondence related to or in reference to this request for proposals, and all reports, charts, displays, schedules, exhibits, and other documentation submitted by the consultant will become the property of the City when received. The City of San Gabriel is subject to California law regarding the disclosure of public records. Consultants must clearly identify any information they regard as proprietary in the proposal. Any such information should be marked “Proprietary” or “Confidential.” Information that is proprietary within the meaning of California law will be withheld from any public records requests. All other information is subject to disclosure. All property rights, including
publication rights of all reports produced by proposer in connection with services performed under this agreement shall be vested in the City of San Gabriel.

J. **Professional Services Agreement** - Upon identification of a preferred provider, the City will request a Professional Service Agreement subject to negotiation of a precise work program, terms of payment, and other City requirements of the City Attorney. The proposer to whom award is made shall execute a Professional Service Agreement with the City within ten (10) calendar days after notice of the award has been sent by mail to it at the address given in its proposal. A copy of the City’s standard Professional Service Agreement has been attached to the RFP for reference.

K. **Exceptions/Deviations** - State any exceptions to or deviations from the requirements of this RFP, Segregating "technical" exceptions from "contractual" exceptions. Where Proposer(s) wishes to propose alternative approaches to meeting the City’s technical or contractual requirements, these should be thoroughly explained. If no contractual exceptions are noted, Proposer(s) will be deemed to have accepted the contract requirements.

L. **City’s Obligation to Award a Contract** - Issuance of this RFP and receipt of proposals does not commit the City of San Gabriel to award a contract.

### II. EVALUATION PROCESS

In reviewing the proposals, a city review team will use the following criteria (not in ranked order):

- Experience and qualifications of the specific individuals who will work on the project, including successful experience drafting historic context statements.
- Amount and quality of time key personnel will be involved in their respective portions of the project.
- Team members’ experience and demonstrated ability to work well with community groups, and City staff.
- References (particularly local government references) and relevant work performed for those references.
- Consultant’s knowledge of best practices in Historic Preservation.
- Consultant’s understanding of the Scope of Services.
- Consultant’s detailed work plan to complete services.
- Overall quality of response to RFP.
- The specific method and techniques including software to be employed by the consultant on the project.
- Overall project timeframe.
- Demonstrated ability to provide clear and compelling presentations to community members, commission members, and elected officials.
- Demonstrated ability to deliver reports that exhibit excellent writing quality and use of high-quality graphic design that communicate clearly and are engaging and accessible to the general public.
- Interview presentation.
- Proposed cost estimate.
Those firms ranked highest will be asked to make oral presentations to supplement the proposal. These presentations would be held subsequent to the receipt of the proposals and will be part of the process for determining the qualifications of the proposers. This presentation will provide consultants the opportunity to detail their work plan, experience and approach to ensure thorough and mutual understanding. All expenses incurred by the consultant for participating in the presentations will be the responsibility of the proposer. The oral presentation may result in the rejection of the proposal by the City. The selected teams will be notified the week of **August 17, 2020** to schedule an interview. Interviews are expected to take place during the week of **August 24, 2020**. After a consultant is selected, the City staff will initiate final contract negotiation. If an agreement on the fee cannot be reached, the City reserves the right to end negotiations and enter negotiations with another firm. It is anticipated that total screening, interviews, selection process, and contract signatures will be completed by September 15, 2020. The project initiation meeting is anticipated to take place on September 21.

**ATTACHMENTS:**

A. Fee Schedule  
B. Hourly Rates  
C. References  
D. Professional Services Agreement (sample)  
E. Sample 2006 survey DPR  
F. Professional Qualifications Standards (36 CFR Part 61, Appendix A)
ATTACHMENT A:
FEE SCHEDULE

Proposing Firm:

Contact Name:

Please mark any item with N/A if you are not proposing to offer that service. Fees listed below should be a maximum annual fee including all direct, indirect, and out-of-pocket expenses.

<table>
<thead>
<tr>
<th>Scope</th>
<th>FY20</th>
<th>FY21</th>
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<tbody>
<tr>
<td>Review existing surveys and plans</td>
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<tr>
<td>Research City documents and available resources</td>
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<td></td>
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<tr>
<td>Provide website information to describe activity and invite public comments</td>
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<tr>
<td>Consult with the community to gather information and build awareness and consensus for the project</td>
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<tr>
<td>Conduct a public workshop to engage interested parties</td>
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<tr>
<td>Prepare a project outline and bibliography</td>
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<tr>
<td>Prepare draft HCS and distribute to City staff</td>
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<tr>
<td>Provide content for the City website on findings of the HCS and inviting public comment</td>
<td></td>
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<tr>
<td>Attend four public meetings of the HPCRC and one City Council meeting</td>
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<tr>
<td>Incorporate comments from City staff; prepare final HCS</td>
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The City reserves the right to select some, all, or none of the items above as part of the final contract.

Costs
List the costs for all tasks and subtasks described in the plan of study. Include a budget describing total costs and billing rates for staff time and materials. The project will require meetings with City staff and other public hearings. The Consultant will be required to attend at least four Cultural Heritage Commission meetings, and one City Council meeting (for final adoption). Estimates for the meetings should be included in the proposal.

CERTIFICATION
I, the undersigned, certify that I am duly authorized to represent the responding firm and am empowered to submit this proposal. In addition, I certify that I am authorized to contract with the City of San Gabriel on behalf of the firm.

Print Name

Signature

Title

Date
ATTACHMENT B:
HOURLY RATES

Proposing Firm:

Contact Name:

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<thead>
<tr>
<th>Position</th>
<th>FY20 Hourly Rate</th>
<th>FY21 Hourly Rate</th>
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Print Name ________________________________

Signature ________________________________

Title ________________________________

Date ________________________________
Attachment C:
REFERENCES

If available, please provide any samples of context work that has been completed by your firm.

Describe fully the last three contracts performed by your firm that demonstrate your ability to provide the services included with the scope of the specifications. Attach additional pages if required. The City reserves the right to contact each of the references listed for additional information regarding your firm's qualifications.

Reference No. 1

<table>
<thead>
<tr>
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<tbody>
<tr>
<td>Contact Individual</td>
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<td>Telephone &amp; Email</td>
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<tr>
<td>Street Address</td>
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<tr>
<td>City, State, Zip Code</td>
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<tr>
<td>Description of services provided including contract amount, when provided and project outcome</td>
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Reference No. 2

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Reference No. 3

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</tbody>
</table>

The proposer shall state whether it or any of its officers or employees who have a proprietary interest in it, has ever been disqualified, removed, or otherwise prevented from
bidding on, or completing a federal, state, or local government project because of the violation of law, a safety regulation, or for any other reason, including but not limited to financial difficulties, project delays, or disputes regarding work or product quality, and if so to explain the circumstances.

- Do you have any disqualification as described in the above paragraph to declare?
  
  Yes ☐  No ☐

- If yes, explain the circumstances.

  
  
  
  
  
  
  
  
  
  
  
  
  
  

Executed on ______________________ at ____________________ under penalty of perjury of the laws of the State of California, that the foregoing is true and correct.

_______________________________
Signature of Authorized Proposer Representative