

**REQUEST FOR PROPOSALS**  
**Facilitator and Project Manager**

**Issued by:**

The Mayor's Fund for Philadelphia

On behalf of The City of Philadelphia, Department of Planning and Development

Questions about this RFP should be submitted to via email to the [mayorsfund@phila.gov](mailto:mayorsfund@phila.gov) by May 8, 2017.

Proposals must be received no later than 5:00 p.m. Philadelphia, PA, local time, on May 15, 2017. A .pdf version of the proposal must be emailed to [mayorsfund@phila.gov](mailto:mayorsfund@phila.gov)

### **Introduction- Statement of Purpose**

The Mayor's Fund for Philadelphia and the Department of Planning and Development seek a qualified professional consultant to manage a Historical Preservation task force appointed by the Mayor James F. Kenney of the City of Philadelphia. Comprised of preservation and design professionals, real estate developers, preservation advocates, community representatives, and government officials, the task force will analyze the current state of historic preservation in Philadelphia, explore best practices in historic preservation nationwide, provide a forum for public discussions of preservation, and develop and report to the Mayor on approaches for encouraging, incentivizing, and improving preservation in Philadelphia. The consultant will arrange, coordinate, publicize, facilitate, and document meetings of the task force and its committees over their 18-month lifespan. The consultant will generate three reports documenting the activities and conclusions of the task force.

### **Department Overview**

The Mayor's Fund for Philadelphia (the Fund) works in close partnership with the City of Philadelphia and private sector partners to develop and run initiatives that reflect Mayoral priorities and seek to improve the quality of life for all Philadelphians. The Fund will serve as the fiscal administrator for this contract opportunity. The Department of Planning and Development will serve as the project manager for this effort on behalf of the Fund.

The Department of Planning and Development coordinates the city's planning, zoning, preservation, and housing functions to promote a dynamic city with strong neighborhoods. Within Planning and Development, the Division of Planning and Zoning is a bridge between the public and government, balancing long term goals and public input to create healthy, equitable and resilient communities that are affordable and desirable. The agencies of the Philadelphia City Planning Commission (PCPC), the Zoning Board of Adjustment (ZBA), the Art Commission and the Historical Commission contribute technical and design expertise to guide public investment to preserve and improve the quality of life for all Philadelphians.

### **Project Background**

Philadelphia's current historic preservation regulatory environment was developed in the early 1980s and its preservation ordinance became effective in 1985. While that historic preservation ordinance has served the City well over the intervening three decades, it merits reconsideration and integration into a broader, more holistic system for managing the historic built environment. Stoking the sense of urgency to reconsider Philadelphia's current historic preservation regulatory environment, the city is enjoying its first sustained population growth in generations. Significant preservation challenges accompany that growth and concomitant building boom. For decades, Philadelphia's planners and preservationists managed a city in decline. Today, they are quickly shifting gears, seeking the tools and strategies to manage a city in expansion. The project is anticipated to be launched in Spring of 2017 and work aggressively over 18 months to produce a specific set of recommendations to provide to Mayor Kenney, Philadelphia City Council, and the Department of Planning and Development.

### **Qualifications**

Statement of Qualifications; Relevant Experience

Provide a statement of qualifications and capability to perform the services sought by this RFP, including a description of three relevant projects that are similar in nature, size, and scope to that which is the subject of this RFP. Identify the firm's role in these projects and the result of the work.

### **General Disclaimer of the City**

This RFP does not commit the Fund or the City of Philadelphia to award a contract. This RFP and the process it describes are proprietary to the Fund and the City and are for the sole and exclusive benefit of the Fund/City. No other party, including any Consultant, is intended to be granted any rights hereunder. Any response, including written documents and verbal communication, by any Consultant to this RFP, shall become the property of the Fund/City and may be subject to public disclosure by the Fund/City, or any authorized agent of the Fund/City.

### **Scope of Work**

The task force will engage in a public conversation on historic preservation in Philadelphia. The task force will include approximately 25 participants, including preservation advocates, real estate developers, builders, architects, residents, cultural foundation and civic leaders, academics, policy and government officials, representatives of financial institutions and professional organizations involved in planning, designing, constructing, and managing the built environment. The task force meetings will be open to the public and held at City facilities in Center City or at other historical facilities throughout the city. They will also work on committees to analyze data to inform the discussions at the Taskforce Meetings. The consultant is responsible for the management of all meetings.

The consultant will facilitate a framing discussion with the task force to set forth the goals and outcomes of the process. At minimum, the consultant will deliver three reports: an initial framing document; a preliminary report at midway with recommendations and proposed strategies that the task force has prioritized; and a final implementation plan (viewed first in draft) that will include required resources, identified roles of the public, private and nonprofit sectors, anticipated outcomes, and a timeline for launching the proposed activities. The consultant will synthesize information, making it accessible, digestible, and actionable for the task force and Planning and Development throughout the process. A national technical assistance partner will provide content expertise, research, and program assessment work to inform the task force. The consultant will ensure that the process is transparent, allowing for public engagement and participation throughout the process.

### **Milestones**

The facilitator's responsibilities will include:

- Developing a detailed plan and schedule for the task force and decision making processes.
- Reporting on a regular basis regarding the status of the project and its progress to the Department of Planning and Development Project Manager.
- Assisting the task force as it establishes working committees and a reporting structure, to ensure there is a balanced review of issues and includes representatives from each area of expertise.
- Working with the national technical assistant provider to assemble background information.
- Convening and documenting meetings of the task force and working committees.
- Producing a baseline white paper on the current state of historic preservation in Philadelphia. The report will be informed by research, data, and analysis, interviews performed by the consultant, and discussions between the Task force members, experts, interested parties, and the public.
- Ensuring the task force issues an Interim Report summarizing the look at national and local strategies that have proven effective at incentivizing adaptive reuse, regulating for preservation outcomes, surveying for historic resources, and educating about the value of preservation.

- Producing a draft Final Report, conceived as an Implementation Prospectus, which identifies selected strategies from the Interim Report, and provides plans for the implementation of those strategies including identifying responsible parties from the government, for-profit, and non-profit realms as well as estimated costs and time frames for implementation.
- Producing a Final Report that accounts for processes to solicit input on a draft Final Report before final release.

The consultant's proposed scope of work should address each objective specifically and describe in detail how the consultant will achieve the objective.

### **Budget**

Estimated Budget for the consultant to manage the task force: \$110,000

### **Services and Work Products**

#### **a) Services**

The task force requires the services listed below including the specific tasks and work activities described. The consultant's proposed scope of work should state in detail how it will carry out each task, including the personnel/job titles responsible for completing the task. For each service specified, the Consultant should propose criteria to determine when the tasks comprising the service are satisfactorily completed. The Consultant may propose additional or revised tasks and activities, but should explain why each is necessary to achieve the project objectives.

- Regular meetings with task force chair, working committee chairs, technical assistant provider, and staff of the Department of Planning and Development.
- Scheduling and publication of meetings of the task force and working committees.
- Provision of meeting materials to participants and public in advance of meetings of the task force and working committees.
- Facilitation of meetings of the task force and working committees.
- Documentation of meetings of the task force and working committees including the generation of meeting minutes that can be posted publicly on the City's website.

#### **b) Tangible Work Products**

The task force requires completion and delivery of the tangible work products listed below. The proposed scope of work should state in detail how the Consultant will produce each work product, including the personnel/job titles that will be responsible for delivering the work product. For each work product, the Consultant should propose criteria for satisfactory completion and delivery. Consultant may propose additional or revised tangible work products, but should explain why each is necessary to achieve the project objectives.

This section is intended only as an overview of specific services to be provided by the Consultant for this project(s). The Department anticipates the work for this project will be organized into the following milestones (at a minimum) listed below. For each milestone, the Consultant should propose criteria to determine when the milestone has been satisfactorily completed. Consultant may propose additional or revised milestones, or a

project structure that does not rely on milestones, but should explain their reasons for the structure proposed and how it will facilitate completion of the work.

- Hold introductory task force meeting in late June 2017
- Hold task force meetings to listen and learn from stakeholders June to September 2017
- Hold task force meetings, bi-monthly November 2017 to December 2018
- Hold working committee meetings, bi-monthly September 2017 to October 2018
- Issue interim report by May 1, 2018
- Issue draft final report by October 1, 2018
- Issue final report by December 1, 2018

The Department reserves the right to condition payments on the satisfactory completion of the specified milestones, tasks, services and/or work products listed above. In addition to describing how each proposed milestone will be accomplished, the scope of work proposed by Consultant should identify the milestones the Consultant proposes as payment milestones and the amount it proposes for each milestone payment. Consultant may propose alternative means of payment, but should explain their reasons for the alternative and how it will facilitate completion of the work.

The Fund anticipates that the work required under this RFP will be completed by December 15, 2018.

#### **Hours and Location of Work**

Public meetings of the task force and working committees will be held during regular work hours and evenings Monday through Friday. Meetings with the task force and committee chairs, technical assistance provider, and City staff will be held during regular work hours Monday through Friday.

#### **Monitoring/ Security**

By submission of a proposal in response to this RFP, the Consultant agrees that it will comply with all contract monitoring and evaluation activities undertaken by the City of Philadelphia, and with all security policies and requirements of the City.

#### **Reporting Requirements**

The successful Consultant shall provide monthly status reports to the Department of Planning and Development and Historical Commission, on a regular basis regarding the status of the project and its progress in providing the contracted services and/or products. At a minimum, the report will include a monthly invoice detailing the services and/or products provided, the goals/tasks accomplished, and the associated costs. If hourly rates are charged, the invoice must also detail the number of hours, the hourly rate, and the individual who performed the service.

Periodic progress reports shall be prepared describing accomplishments, decisions and overall progress made during the period. It shall contain updated project schedule and budget information and shall specifically include information regarding RFIs, change orders, submittals as well as the Consultant's invoice status. Progress reports will be submitted with each payment request, or monthly, whichever represents the shorter duration.

Upon review and approval of deliverables by the Department of Planning and Development Project Manager Project Manager, the invoice will be submitted for payment by the Fund.

### **Insurance Requirements**

The standard minimum insurance policy requirements to be maintained by contractors of The Mayor's Fund are listed below. Contractor must maintain:

1. Workers' compensation (or similar) insurance as required by the jurisdiction where the Services are performed
2. Commercial general liability insurance (including products liability, completed operations and contractual liability coverage) with minimum limits applicable to bodily injury and property damage of \$1,000,000 per occurrence, and \$2,000,000, and containing a waiver of subrogation against The Fund
3. Excess or umbrella insurance with minimum limits of \$1,000,000 per each occurrence and in the aggregate and containing a waiver of subrogation against The Fund
4. Errors and omissions insurance with minimum limits of \$1,000,000 combined single limit

Such policies must (a) be in Vendor's name unless agreed upon in writing by The Fund, (b) include The Fund and its employees as additional insureds, (c) not have a deductible exceeding \$25,000 per claim, and (d) be placed with insurers reasonably acceptable to The Fund, having a Best's rating of no less than "A-". These minimum insurance amounts are not to be construed as limiting a Contractor's right to obtain additional coverage and higher liability limits at Contractor's discretion. Contractor may be required to provide proof of insurance at the Fund's discretion.

### **Background Check**

Prior final selection, the top Consultant will be subject to a background check that shall include, but may not be limited to: criminal records (County and State Criminal Felony and Misdemeanor, National Criminal Database, Federal Criminal) and the National Sex Offender Registry.

### **Submission Requirements:**

#### **1. Organization & Personnel Qualifications:**

The proposal must identify the Consultant's qualifications by education level, skill set (described in detail), experience level, and job title. Resumes of all personnel so identified should be included in Consultant's proposal. Experience with "like" projects should be cited. Successful candidates will demonstrate an understanding of the Philadelphia real estate market and development processes.

#### **2. Scope of Work Description:**

The scope of work proposed by Consultant should include a general project schedule that identifies all tasks, activities, deliverables, and milestones the Consultant proposes to carry out for the project and a time of completion (measured from project start date) for each. The Consultant should state the number of days following the Fund's authorization to proceed by which it will be ready to start the work, including any mobilization time. If the Consultant proposes a different overall time of performance, it should state its reasons.

**3. Cost Proposal:**

Consultant must provide a detailed cost proposal, which must include 1) a line-item breakdown of the costs for specific services and work products proposed, and 2) a statement of staff hourly rates. The proposed price must include all costs that will be charged to the City for the services and tangible work products the Consultant proposes to perform and deliver to complete the project. Any contract resulting from this RFP will provide for a not-to-exceed amount in the compensation section of the contract.

**4. References:**

Include contact information for a minimum of (2) references who can speak to the Consultant or firm's experience with similar types of work as that described in this RFP.

**5. MBE/WBE/DBE:**

The Department of Planning and Development seeks to promote opportunities for disadvantaged business. For all contracting efforts, each prime consultant and contractor shall use its good faith and nondiscriminatory efforts to provide joint venture partnerships, sub-consulting and subcontracting opportunities for minority, women, disabled, and/or disadvantaged business enterprises (collectively, M/W/DS-BE and/or DBE) registered in the City of Philadelphia's Office of Economic Opportunity ("OEO") and/or any agency that the City of Philadelphia recognizes as having bona fide certifying program. The Department's OEO goal is 35% for all contracting activities.

**6. Deadline for Submission:**

Responses to this RFP must be emailed as a single .pdf by **5:00 pm Monday May 15, 2017** to [mayorsfund@phila.gov](mailto:mayorsfund@phila.gov)

**Proposal Review and Selection Process:**

Due to the shortened timeframe to execute a contract, proposals will be reviewed and a limited number of in-person interviews will be held. Respondents that will be invited to be interviewed will be notified on May 19, 2017. Interviews will be conducted at a mutually agreed upon time on Monday May 22, 2017 or May 23, 2017.

The successful candidate will be the person/firm who demonstrates the knowledge, experience and ability to perform the work effectively and collaborate with the national technical assistance partner on the project.

Per the Fund's contracting policies, the initial term of the contract between the Fund and the winning Consultant will be 18 months.