

**Request for Proposals
for
Consultation/Facilitation Services to assist the Philadelphia Historical Commission in
Developing a Request for Proposal and Convening a Project Team in advance of a Historic and
Cultural Resources Survey Pilot**

OBJECTIVE

The Mayor's Fund for Philadelphia ("Fund"), the City of Philadelphia ("City"), and the Department of Planning and Development (DPD) seek a qualified firm or individual (herein referred to as "Consultant") that can provide facilitation services to support the Philadelphia Historical Commission's (PHC) initial planning phase for a Historical and Cultural Resources Survey Plan and Pilot Project. The Consultant will work with DPD staff to establish an RFP Evaluation Team, develop a set of best practices for conducting public engagement, and draft a Request for Proposal seeking a Survey Consultant Team.

BACKGROUND

In April 2019, the Mayor's 33-member Historic Preservation Task Force released a set of recommendations based on their 18-month process to expand preservation efforts in Philadelphia (available at <https://www.phlpreservation.org/>). The Task Force efforts were funded by The William Penn Foundation. The National Trust for Preservation also provided in-kind support through technical assistance.

One of the primary recommendations of the report was to establish an ongoing, city-wide survey to help to identify cultural and historic resources throughout Philadelphia. Earlier this year, The William Penn Foundation again agreed to assist the City with its efforts through funding a resource survey plan and pilot project. Creating an equitable plan for survey is an important component of the Task Force's recommendation. The survey pilot project will explore ways to engage with populations and histories not currently reflected in the properties listed on the Philadelphia Register of Historic Places. Through the project, DPD seeks to expand the traditional understanding of preservation to include a wider range of tools and more comprehensive understanding of cultural heritage. The ultimate goal is to develop a process that engages the public, ties together work across City departments, and ultimately leads to strategic and equitable designations and documentation to protect both tangible and intangible resources.

The selected Consultant will lead efforts to develop a Request for Proposal seeking support in designing and implementing a citywide historic and cultural resources survey plan. This is the initial phase of the City's efforts to establish an ongoing, citywide resources survey effort. While the Task Force brought many voices to the table around historic preservation, a strong focus of this initial phase will be to partner with cultural institutions and organizations, to ensure that the RFP conveys a collective direction for the survey planning process.

SCOPE OF WORK

Below is a description of the various roles that the Consultant, DPD staff and the Mayor's Fund will fulfill during the first phase of the project.

The **Consultant will** report to DPD staff and work closely with project managers to:

- Identify members of RFP Evaluation Team, focusing on external partners
- Organize a combination of interviews, focus groups, and meetings of project partners to establish a consensus around goals, values, and outcomes for the survey plan
- Manage meeting logistics for the RFP Evaluation Team, including:
 - Coordinating and scheduling meetings
 - Assembling and distributing meeting materials
 - Recording meetings and handling follow-up communication
- Produce a list of best practices that identifies different types of outreach and methods of engagement with a focus on removing barriers to entry and incorporating social distancing requirements
- Draft and finalize a Request for Proposal that includes competencies required of respondents, a scope of work for the project, and requirements for engagement and outreach

DPD staff will review progress, deliverables, and invoices and authorize the Mayor's Fund to release payments as well as perform the following:

- Manage project timeline to ensure initial planning deadlines are met
- Work with Consultant to identify members of RFP Evaluation Team, focusing on internal partners
- Work with Consultant to develop content for meetings and format of discussion
- Work with Consultant to develop set of best practices for engagement and outreach
- Coordinate media strategy with DPD communication staff

The **Mayor's Fund will** serve as the fiscal administrator for this contract opportunity. DPD staff will serve as the project manager for this effort on behalf of the Fund.

PROJECT SCHEDULE

All work is to be completed within 120 days from the start date.

Identify potential members of RFP Evaluation Team and begin outreach	20 days from start date
Convene series of meetings with project partners	20-75 days from start date
First draft of RFP due	90 days from start date
Draft of Best Practices for Survey Outreach and Engagement due	100 days from start date
Final drafts of RFP and Best Practices document due	120 days from start date

QUALIFICATIONS

Experience with historic and cultural resources is preferred but not required. Applicants must have experience in the following fields:

- Facilitation with a focus on community engagement and creative thinking
- Developing and drafting Requests for Proposals
- Project management with particular experience managing diverse groups

BUDGET

This will be a fixed priced contract and has been budgeted to be at or near \$12,000. The Consultant may bill no more frequently than monthly and should bill by percent complete of each task. Payment for completion of milestones will be contingent on the product being accepted by DPD.

INSURANCE REQUIREMENTS

The standard minimum insurance policy requirements to be maintained by Consultants of The Mayor's Fund are listed below:

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.

RESPONSES

Due to this project's limited budget, extensive proposal packages are not expected. Please include the information below and adhere to the suggested page limits:

1. Organization & Personnel Qualifications:

The proposal must identify the Applicant'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 Applicant's proposal. Experience with "like" projects

should be cited. Applicants should also state the number of days following the Fund's authorization to proceed by which they will be ready to start the work, including any mobilization time. One page, not including resumes.

2. Project Understanding:

Applicants should provide a description of their understanding of the project, based on the above Background and Scope of Work. The description should include a general plan for implementation and any ideas for different and/or creative approaches to assembling the RFP Evaluation Team, planning for public outreach and developing the RFP. One to two pages.

3. Cost Proposal:

Applicants must provide a cost proposal, which should include hourly rates for proposed staff and an estimated breakdown of how the budget will be spent that identifies cost of labor and other anticipated expenses. Any contract resulting from this RFP will provide for a not-to-exceed amount in the compensation section of the contract. One page.

4. References:

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

5. MBE/WBE/DBE:

DPD 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. Questions

Any questions related to this RFP should be submitted to preservation@phila.gov by August 31, 2020. Responses will be posted to the Mayor's Fund website by September 4, 2020.

7. Deadline for Submission:

Responses to this RFP must be emailed as a single .pdf by 5:00pm September 15, 2020 to preservation@phila.gov and mayorsfund@phila.gov. Note that responses may be a public record subject to disclosure as required by the Pennsylvania Right To Know Law. Documents provided in response to this RFQ may also be required to be disclosed by applicable law, subpoena, and/or court order.

RESTRICTIONS

The applicant selected as RFP facilitator will not be eligible to apply for the position of Historic and Cultural Resources Survey Consultant or be included in any team proposal submission.

EVALUATION

The successful applicant will be chosen based on a demonstration of knowledge, experience, ability and capacity to perform the work effectively.

RESERVATION OF RIGHTS

The Fund reserves the right to accept or reject any and all submissions and to reissue this RFP at any time prior to execution of a final contract; issue a new RFP with terms and conditions substantially different from those set forth here; extend the time period for responding to this RFP; or cancel this opportunity with or without another notice of contract opportunity. The City reserves and may exercise the following rights and options with respect to this selection process:

- To request additional material, clarification, confirmation or modification of any information in the submission
- To solicit new proposals
- To supplement, amend, substitute or otherwise modify this RFP any time prior to selection of one or more respondents for negotiation
- To request supplements to submission based on the review of all submissions
- To negotiate any aspect of the submission
- To conduct personal interviews with respondents to assess compliance with the selection criteria
- To terminate any negotiations at any time
- To expressly waive any defect or technicality in any submission
- To rescind a selection prior to contract execution if the Authority determines in its sole discretion that the submission does not confirm to the specifications of this RFP