

# SCOPE OF WORK

## UPDATE OF HISTORIC PRESERVATION REGULATIONS

### Objective

The Sausalito Community Development Department is soliciting proposals from qualified consultants for updating the City's Historic Preservation regulations.

### Location and Background

The City of Sausalito is a small community incorporated in southern Marin County in 1893. The City has approximately 7,300 residents and a land area of 2.2 square miles. Sausalito is a waterfront community adjacent to Richardson's Bay and the Golden Gate National Recreation Area.

In 1976, the City Council adopted historic preservation regulations and in 1981 a Downtown Historic District was established. The historic preservation regulations have been codified in the Municipal Code and subsequently amended several times (see **Exhibits A through G** for the current Municipal Code provisions).

In 2009, the City engaged Winter and Company to prepare Historic Design Guidelines for to assist property owners, designers, residents, decision-makers, and staff in the review of development projects involving historic structures. The public review draft of the Guidelines was published in March 2011 (see **Exhibit H**). It is anticipated the Guidelines will be approved by the City Council in the summer-fall of 2011.

### Project Description and Consultant Tasks

The City has the following objectives in updating its historic preservation regulations:

- Assess the historic preservation regulations for opportunities to improve and make the regulations more efficient and effective;
- Consolidate the regulations in the Municipal Code to make the regulations more user-friendly;
- Amend the regulations to address issues such as demolition by neglect and economic hardship; and
- Evaluate the process used by the City's Historic Landmarks Board (HLB), Planning Commission, and staff to determine if opportunities are present to make the process more efficient for all involved parties, including property owners and architects.

The City is seeking is comprehensive and consolidated historic preservation regulations which include the following elements:

1. Purpose and applicability of the historic preservation regulations
2. Definitions
3. Establishment of the historic landmarks board
  - a. Composition
  - b. Powers and duties

4. Procedures and criteria for designation of historical resources on the local register
  - a. Surveys and studies
  - b. Criteria for designating historical resources
  - c. Procedures for designation (or deletion) of resources on (or from) the local register, including noticing requirements
5. Procedures and criteria for review of projects involving historic resources
  - a. Application of historic design review guidelines to projects
  - b. Procedures for reviewing certificates of appropriateness
    - i. Demolition, addition, and modifications, telecommunication facilities, and religious land uses
    - ii. Public hearing and noticing requirements
  - c. CEQA and historic preservation
6. Consideration of economic effects
  - a. Incentives
  - b. Economic hardship, including certificates of economic hardship
7. State historic building code
8. Duty to keep in good repair and ordinary maintenance and repair
9. Unsafe and dangerous conditions
10. Enforcement and penalties
11. Appeals

Consultants are encouraged to review Technical Bulletin No. 14 regarding Drafting Effective Historic Preservation Ordinances (prepared by the California Office of Historic Preservation, Department of Parks & Recreation) for issues that may be addressed in the updated regulations.

### **Schedule and Deliverables**

The proposal should incorporate the following schedule and deliverables.

1. Preparation of an outline of the Historic Preservation Regulations – Delivered within 10 business days following contract execution.
2. Preparation of Administrative Draft of the Historic Preservation Regulations – Delivered within 20 business days of the receipt of staff comments on the outline.
3. Preparation of Public Hearing Draft of the Historic Preservation Regulations – Delivered within 10 business days of the receipt of staff comments regarding the Administrative Draft

When each deliverable is submitted, the consultant will provide one unbound original and an electronic copy in Word. Business days exclude Saturdays, Sundays, and City holidays.

### Meeting Participation

The proposal should incorporate attendance at one kickoff meeting with staff, a public workshop, and attendance at two public meetings. Attendance at additional public meetings may be required on an as-needed-basis.

### Compensation

Compensation for preparation of the Historic Reservation Regulations will be provided on a fixed cost basis on the following schedule.

- Delivery of a satisfactory outline of the Historic Preservation Regulations – 10% of fixed cost
- Delivery of a satisfactory Administrative Draft of the Historic Preservation Regulations – 50% of fixed cost
- Delivery of a satisfactory Public Hearing Draft of the Historic Preservation Regulations – 30% of fixed cost
- Completion of all contractual duties – 10% of fixed cost

Compensation for revisions of the regulations after submittal of a satisfactory Public Hearing Draft, additional printing, and meeting attendance (exclusive of the kickoff meeting) will be provided on a time and materials basis. Approved invoices for time and materials charges will be paid within 30 days of receipt.

### Proposal Submittal Requirements

The proposal must include the following:

- A. Four copies of proposal on 8 1/2 " x 11" sheets.
- B. A brief response which demonstrates an understanding of the key elements of the project.
- C. Qualifications and experience of the firm and personnel, including:
  1. Description of the project team's organization, including identification of the principal, project manager responsible for day-to-day tasks, and key personnel.
  2. Estimated hours, by staff member, for accomplishment of the respective tasks.
  3. Resumes of all key personnel.
  4. Qualifications and recent experience in performing similar work.
  5. References from at least three recent clients involving development of Historic Preservation regulations.
- D. Comments or concerns regarding the City's Standard Professional Services Agreement (see **Exhibit I**).

Suggestions for optional services or approaches for addressing issues may also be included.

### **Proposal Selection Procedures**

Proposals will be reviewed utilizing the submitted information. The selection process may include an interview of top consultant teams. The final decision will be based on the following criteria:

- Experience with the preparation of Historic Preservation regulations;
- Quality and responsiveness of proposal;
- Demonstrated competence and professional qualifications necessary for satisfactory performance of the work required;
- Recent experience in successfully performing similar services; and
- Cost.

### **Exhibits**

- A. Municipal Code Chapter 2.28, Historic Landmarks Board
- B. Municipal Code Chapter 8.44, Preservation of Historical Landmarks
- C. Zoning Ordinance Section 10.28.040, Historic Overlay [Zoning] District
- D. Zoning Ordinance Section 10.42.070, Sign Standards in the Historic Overlay [Zoning] District and for Properties Listed on the Local Register
- E. Zoning Ordinance Section 10.44.130, Arks
- F. Zoning Ordinance Chapter 10.46, Historic Overlay District and Local Register
- G. Zoning Ordinance Section 10.80.060, Historic Landmarks Board
- H. Historic Design Guidelines, Public Review Draft, March 2011
- I. Standard Professional Services Agreement

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