



## **City of San Mateo Request for Proposals for Historic Preservation Services**

Prepared by the Community Development Department  
330 W. 20<sup>th</sup> Avenue  
San Mateo, CA 94403

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# **INTRODUCTION AND OVERVIEW**

## **Introduction and Overview**

The City of San Mateo's General Plan 2040, adopted by the City Council on March 18, 2024, sets the policy framework for how issues such as historic resources and preservation should be addressed. The Community Design and Historic Resources Element addresses the topic of historic and cultural resources, and includes goals, policies, and actions that outline the framework for how the City should approach historic preservation. Specifically, Goal CD 5 speaks to preserving the historic and culturally important resources to maintain San Mateo's special identity and continuity with the past and includes seven policies and six actions to support achievement of this goal. View the plan at [General Plan | San Mateo, CA - Official Website \(cityofsanmateo.org\)](https://www.cityofsanmateo.org/General-Plan-2040)

During the adoption process for General Plan 2040, the topic of historic resource preservation generated significant community interest and comments – with the historic-related policies and actions based around this community input and the final versions based on City Council direction. In addition, a historic district designation application for a local neighborhood was submitted to the State Office of Historic Preservation by the San Mateo Heritage Alliance. This application resulted in significant community discussion surrounding establishing historic districts, how the designations are approved at the State and local levels, and questions about the potential impacts of an application and a subsequent designation on properties within the district. To address questions about the State and local historic review processes and how historic districts are established, Planning Division staff, with support from our historic consultant, conducted a community informational meeting in February 2024. The City also updated its website to provide a [webpage](#) with FAQs related to the historic district designation process, the City's permitting process for potential historic resources, and how the California Environmental Quality Act (CEQA) addresses historic resources.

## **Background**

The City of San Mateo, incorporated in 1894, is the largest municipality in San Mateo County, California with a population of approximately 105,600. It is one of the larger suburbs of the San Francisco Peninsula, and when traveling on U.S. Highway 101, San Mateo is approximately 30 minutes from downtown San Jose and 25 minutes from downtown San Francisco.

The City of San Mateo is a charter city and has a Council-Manager form of government. The City Council is comprised of five council members who rotate annually as mayor. The City Manager is appointed by the Council and serves as the chief executive officer responsible for the day-to-day administration of City affairs. The Council also appoints a City Attorney. There are seven advisory boards and commissions appointed by the Council.

The City provides a wide range of municipal services including police, public works, parks and recreation, library, planning and zoning, building inspection, code enforcement, affordable housing, sewer system, street maintenance, economic development, and general administrative services. The City shares a consolidated Fire Department with the cities of Foster City and Belmont.

## **Historic Resources**

The City's history is represented in the almost 200 historic resources and two historic districts as identified in the 1989 Historic Building Survey, with approximately 37 of these structures individually eligible for the National Register of Historic Places. They range from historic buildings in the Downtown to single-family homes from the late nineteenth century. In addition, there are seven historic resources listed on the National Register of Historic Places and seven historic resources on the State Register of Historic Places. State and federal laws and programs help to protect historic and archaeological resources, including the California Historical Building Code, which

preserves California’s architectural heritage by ensuring historic buildings are maintained and rehabilitated in accordance with historically sensitive construction techniques. The City’s Historic Preservation Ordinance (SMMC Chapter 27.66) was also updated to align with the 1989 Survey and codify the Downtown Historic District designation.

However, since the early 1990s, there has not been much work completed to update the City’s Historic Preservation Ordinance, implement other recommendations in the 1989 Survey, or further develop the City’s Historic Resources Inventory. With the General Plan Update, the topic of historic preservation received a lot of community input, which resulted in the development of the policies and actions in the Community Design and Historic Resources Element, specifically under Goal CD-5– “Preserve historic and culturally important resources to maintain San Mateo’s special identity and continuity with the past.” The first policy under this goal (Policy CD 5.1) focuses on developing a comprehensive approach to historic preservation – “Implement a comprehensive approach to historic preservation based on community input and best practices from State and federal agencies, to find an appropriate balance between preservation with other important priorities, such as affordable housing production and supporting local businesses.” Goals and policies focused on protecting archaeological and resources that are culturally significant to Native American tribes can be found under Goal CD-4 of this Element.

## **OBJECTIVES**

To begin the process of updating the City’s historic preservation policies, creating clear and comprehensive processes for historic designations, and establishing a consistent approach for surveying and identifying eligible historic resources, the City is seeking to implement the first two actions under Goal CD-5 in the Community Design and Historic Resources Element of General Plan 2040.

**Action CD 5.8 Historic Preservation Ordinance.** Update the City’s Historic Preservation Ordinance to create a framework for the designation of historic resources and districts, establish review and permitting procedures for historic alterations, demolitions or relocations, be consistent with federal and State standards and guidelines, and align with the other goals and policies outlined in this Element.

**Action CD 5.9 Historic Resources Context Statement.** Prepare a citywide historic context statement to guide future historic resource survey efforts to identify individually eligible resources and historic districts. If a neighborhood is identified as a historic district, prepare a more detailed historic context statement for that individual neighborhood.

The City is interested in hiring a qualified historic preservation consultant to prepare a citywide historic context statement and update the City’s Historic Preservation Ordinance per the actions listed above. Implementation of these actions include: public outreach and engagement, including community meetings; City Council study sessions and public hearings; code amendments to update the City’s Historic Preservation Ordinance; research and development of a citywide historic context statement and policy; and preparation of associated internal processes and documentation to implement this new code and policy. Staff anticipates that this work could require up to 12 months to complete depending on level of community engagement and number of public meetings necessary to achieve policymaker consensus in particular around the historic district designation process and parameters.

## SCOPE OF SERVICES

The Scope of Services described herein is the minimum necessary to meet the City's objectives. The Consultant shall be able to perform the work as detailed in the Scope of Services as provided in Attachment A – Scope of Services. Each proposer is expected to expand the scope by incorporating their expertise and proposed method of approach.

The Scope of Services shall include, but not be limited to, performing the following tasks (a more complete listing of the Scope of Services is described in Attachment A):

- 1) Kick-off Meeting and Ongoing Project Management.
- 2) Research and Analysis.
- 3) Community Outreach and Engagement.
  - Includes preparation of an outreach strategy, preparation of associated materials and content, holding of meetings with both stakeholders and communitywide, and capturing of input.
- 4) Study Sessions with decisionmakers (on-site preferred, but virtual can be accommodated).
- 5) Development of Updates to the City's Historic Preservation Ordinance and Preparation of a Citywide Historic Context Statement and Historic Policy.
- 6) Public Hearings and Presentations to Planning Commission and City Council (on-site preferred).
- 7) Development and Implementation of Internal Processes and Documentation for the new code and policy.

Consultant shall perform the services and complete tasks listed above within 12-months of contract award – this includes the time required to ensure the tasks to be completed have incorporated changes from the City and have been approved.

## MINIMUM QUALIFICATIONS

The proposal shall demonstrate that the Consultant meets the following minimum qualifications:

- Competent and professional staff and project team.
- Experience for the type of work outlined in the Scope of Services.
- Extensive knowledge of historical preservation.
- Extensive experience working with local governments.
- Demonstrated knowledge of applicable local, state, and federal codes and laws that may be applicable to the work.
- Demonstrated knowledge and capability to produce project documents as outlined in the Scope of Services.
- Proven record of completing tasks and projects on-time and on-budget.
- Flexibility in adapting to meet the needs of unique organizations.

## COMPENSATION

Provide a Cost Proposal and Project Schedule for the Consultant to perform the Scope of Services as outlined in Attachment A, including:

- **Estimated Not-To-Exceed Maximum Cost.** The cost proposal should contain all pricing information relative to performing the Scope of Services as described in Attachment A. The estimate is to contain all direct and indirect costs, including all out-of-pocket expenses. Provide a budget for each major milestone or task for the entire Scope of Services. The proposed budget should be inclusive of all meetings, conference calls, site

visits, and deliverables. The budget should include a list of anticipated reimbursable expenses with rates charged for each. The City has budgeted up to \$500,000 for this effort, inclusive of costs to conduct community outreach and engagement, internal staff time to manage the effort, and the Consultant's completion of the specified work. Thus, the City is seeking proposals that reflect the Consultant's true expectations regarding the level of effort required to perform the Scope of Services.

- **Estimate for Optional Services.** After reviewing the Scope of Services outlined in Attachment A, the Consultant may recommend other tasks beyond the Scope of Services listed if they are deemed appropriate to achieve the objectives set forth in this RFP. For those additional tasks, the Consultant may include this service in the proposal as an optional task with an estimated cost.
- **Rate Schedule.** Include separate schedules of all fees and expenses for each of the tasks and deliverables described in Attachment A. These schedules should include the following: position titles; hourly rates; number of hours anticipated for each staff level; and out-of-pocket expenses such as transportation, meals, communications, and publishing costs. The total of these separate schedules should have a direct relationship to the estimated not-to-exceed maximum cost.
- **Project Schedule.** Depict a schedule to identify the overall timeline for the project, and an estimated time to completion for key tasks and deliverables. The City anticipates the contract to be awarded in late 2024.

The successful proposer(s) will be expected to enter into an agreement for professional services in the form provided (see Attachment B).

## **SUBMITTAL REQUIREMENTS**

All responses must be typewritten and include the name, address, telephone number, and primary email of the proposer's contact.

All proposals should be specific, brief (not to exceed 10 pages – attachments not included in page number) and address the following items in the order listed below. Submittals not organized according to the following format may be rejected.

- Cover Letter, including a statement of ability to sign the City's professional services agreement and meet necessary insurance requirements.
- Table of Contents and corresponding page numbers
- Executive Summary. This section shall be a brief introduction of the Consultant, including the Consultant's name, address, phone number, email, and tax identification number.
- Firm Profile. General information about the firm, date of firm's establishment, financial stability, and resources. Provide a brief firm history and description of the firm (including number of permanent employees, types of services offered, Consultant resources, etc.) and the Consultant's areas of expertise related to the Scope of Services provided. Identify the Consultant's office location closest to San Mateo. If the Consultant is currently engaged in any litigation or has been engaged in litigation as a defendant in the last five (5) years, please provide that information. Please list any contract terminations if any have occurred in the last five years.
- Firm Contact Information, specifically the individuals in charge of the proposal and contract negotiations.
- Qualifications as outlined above. Provide descriptions and history of pertinent experience with other public municipalities and private sector clients. Include the contract amount, final cost, time to completion, and if the contract is active. Describe any other facets of the Consultant's experience that are relevant to this proposal that warrants consideration.
- List of firm's project team members who will provide the requested services, including a summary of their experience and resumes.

- History and experience performing similar work for government entities.
- Work Plan. Describe the Consultant's process to provide the work described in the Scope of Services (Attachment A) and any recommendations. Include a description of the Consultant's ability to meet the services requested. Provide a specific methodology that recommends and justifies the level of detail to be included in the proposal in response to the Scope of Services. The proposal should also detail the Consultant's approach to documenting processes and functions and developing recommendations.
- Provide **at least** three applicable client references and contact information, all three should be from work performed within the past four years. Include a brief description of the work performed for each reference.
- Identify any suggested modification to the Scope of Services.
- Identify tasks that the Consultant will perform versus tasks City staff will perform or coordinate.
- Budget. Provide the hourly rate proposed to perform the Scope of Services, as well as any recommended alternative services.

## Timeline

Action	Date
RFP Issuance Date	August 13, 2024
Deadline for Questions	August 25, 2024
City's Responses to Questions	August 30, 2024
<b>Proposal Submittal Deadline</b>	September 13, 2024
Interviews with City staff	Week of September 30, 2024
City Determines Finalist for Contract Negotiations	Week of October 14, 2024
Contract to be Finalized	November 2024
City Council to Approve Final Contract	December 2024
Work to Commence	January 2025

## Public Records

All proposals submitted in response to this RFP become the property of the City, and under the Public Records Act (Government Code section 7920.000, *et. seq.*), are public records, and as such may be subject to public review. However, the proposals shall not be disclosed until negotiations are complete and the successful proposers are selected. If a proposer claims a privilege against public disclosure for trade secret or other proprietary information, such information must be clearly identified in the proposal, and the City will attempt to provide notification prior to any disclosure. However, the City will follow the Public Records Act requirements for disclosure or non-disclosure, regardless of such designation.

## SELECTION PROCESS

The City will evaluate each of the proposals based on a variety of criteria including:

- Demonstrated understanding of the Scope of Services.
- Qualifications.
- Experience.
- Overall proposal.
- Proposed hourly rate.
- Willingness to enter into an agreement and provide insurance substantially in the form of the attached agreement (Attachment B).

### **Interview**

City staff will review the proposals and may select finalists to participate in an oral interview with an informal question and answer discussion of no longer than 30 minutes. The City will only notify those proposers selected as finalists. Selected proposers will also be allowed up to 15 minutes to present their experience and ability to perform duties.

### **Investigation**

The City may investigate qualifications of all prospective consultants to whom the award is contemplated and may request clarifications of proposals directly from one or more proposers. The City reserves the right, at its sole discretion, to request clarifications of proposals or to conduct discussions for the purpose of clarification with any or all prospective consultants. The purpose of any such discussions shall be to ensure full understanding of the proposal. Discussions shall be limited to specific sections of the proposal identified by the City and, if held, shall be after initial evaluation of proposals are complete. If clarifications are made as a result of such discussion, the prospective consultant shall put such clarifications in writing.

### **Right to Reject**

The City reserves the right to accept and/or reject any or all proposals submitted, and or to request additional information from all proposers. The City also reserves the right to modify any aspects of, terminate, or delay this RFP and the RFP process, which is outlined within this RFP, at any time. Agreement award will be made at the sole discretion of the City based on an evaluation of all responses.

### **Late Proposals**

Proposals received late will not be given any consideration. All proposals are date/time stamped upon receipt via email.

### **Proposal Preparation Costs**

Each proposer submitting a response to this RFP acknowledges and agrees that the preparation of all materials for submittal to the City, all presentations, related costs and travel expenses are at the prospective consultant's sole expense, and the City shall not, under any circumstances, be responsible for any cost or expense incurred by the proposer.

### **Agreement**

Once the City selects a Consultant, the City and Consultant will execute a Professional Services Agreement as provided in Attachment B.

## **QUESTIONS AND INQUIRIES**

Questions regarding this RFP should be submitted via email to the RFP Coordinator: Tara Peterson at [tpeterson@cityofsanmateo.org](mailto:tpeterson@cityofsanmateo.org).

**Questions must be received in writing via email by 5:00 p.m. on the day provided in the Timeline above.**

Questions received after the date and time stated will not be accepted.

Questions will be answered by the City via an upload onto the City website by 5:00 p.m. on the date provided in the Timeline. A link will be provided upon request and answers will be posted iteratively as questions are received. The source of any questions will remain anonymous.

## ATTACHMENTS

- A. Scope of Services
- B. Professional Services Agreement
- C. Insurance Requirements



## **ATTACHMENT A**

### **SCOPE OF SERVICES**

**Scope of Services.** The historic Consultant will update the City's Historic Preservation Ordinance and develop a citywide historic context statement and historic policy per the actions in our recently adopted General Plan 2040. The Consultant shall work closely with City staff to:

1. Review and evaluate the City's 1989 historic survey, existing historic district designations, General Plan 2040, and the current Historic Preservation Ordinance (SMMC Chapter 27.66).
2. Research and develop a citywide historic context statement and policy.
3. Conduct public outreach and engagement, including community meetings and decisionmaker study sessions, to receive input on what should be included in the updated Ordinance and policy, with a focus on historic district parameters and the designation process.
4. Develop code amendments to update the Historic Preservation Ordinance to align with State and Federal best practices, General Plan 2040, and community and decisionmaker input.
5. Hold public hearings, with presentations, before the Planning Commission and City Council, to adopt the citywide historic context statement, Historic Preservation Ordinance amendments, and associated historic policy (if needed).
6. Develop internal processes, including procedures and screening criteria, to implement the new code and policy.

**Tasks.** Consultant shall perform the services and complete tasks listed below within one-year of contract award – this includes the time required to ensure the tasks to be completed have incorporated input and direction from the City and have been approved.

1. Kick-Off Meeting (Virtual/On Site) and Ongoing Project Management.
  - Hold a meeting with key City staff to discuss parameters of the Consultant's work, potential questions and needs, goals and scope of service objectives, next steps, and draft schedule.
  - Schedule biweekly meetings for the duration of the project between staff and the Consultant to discuss issues, in addition to the progress meetings listed below.
  - Provide the City with a list of needs to support Consultant activities.
    - *Deliverables. Meeting agenda, minutes, bi-weekly meeting schedules, revised project schedule based on discussion, project goals memorandum, and revised work plan, if necessary.*
2. Research and Analysis.
  - Review the City's General Plan 2040, specifically related to historic resources and actions.

- Review the City’s Historic Preservation Ordinance (SMMC Chapter 27.66).
  - Review 1989 historic survey and the two historic districts.
  - Research best practices in historic preservation policies adopted by other California jurisdictions, with a focus on cities with similar characteristics to San Mateo.
  - Research best practices for historic district parameters and designation processes, with a focus on cities with similar characteristics to San Mateo.
  - Research information related to a citywide historic context.
  - Analyze the existing historic documents and compare with General Plan 2040.
- *Deliverables. Prepare a table of comparisons, outlining the necessary changes required to the existing Ordinance to meet the criteria in General Plan 2040, options for creating a historic district designation process, and provide a summary of the historic policies and best practices researched.*

### 3. Community Outreach and Engagement.

#### 3.1 Outreach and Engagement Strategy

- Provide recommendations on informational materials, presentations, social media postings, website postings, mailings, etc. that would be appropriate to support this type of effort, and support development of agreed upon materials and content.
  - Submit all outreach material to the City team for approval prior to implementation.
  - Work with City staff to arrange and advertise the meeting(s).
- *Deliverables. Draft outreach materials, presentations, postings, etc., meeting planning, including schedules, venues, contacts, etc.*

#### 3.2 Outreach and Engagement Delivery

- Focus of outreach and engagement is to obtain early community input on context statement and Historic Preservation Ordinance Amendments.
- Community engagement events and public meetings will include:
  - Stakeholder meetings with individual groups and organizations (3-5).
  - Community meetings (one virtual and one in-person).
  - Decisionmaker study session – (in-person).
- Capture all input received from the community.
- Following early engagement activities, use input collected to guide preparation of updated Historic Preservation Ordinance and draft context statement.
- Conduct 1-2 community meetings (virtual and/or in-person) to present draft Historic Preservation Ordinance and draft context statement and historic policy for input.
- Capture all input received from the community.

- *Deliverables. Draft outreach materials, presentations, postings, etc., meeting planning including schedules, venues, contacts, meetings held, and community input encouraged, documented, and summarized.*

4. Preparation and Development of Historic Preservation Ordinance Amendments and a Citywide Historic Context Statement and Historic Policy.

- Draft updates to the Historic Preservation Ordinance for review by City staff and the community.
- Draft Citywide Historic Context Statement and historic policy (if needed) for review by City staff and the community.
- Update both documents based on community input and decisionmaker direction.
- Prepare final versions for adoption.

- *Deliverables. Draft updates to the Historic Preservation Ordinance draft context statement and historic policy.*

5. Planning Commission and City Council Public Hearings (On-Site).

- Prepare preliminary draft staff reports and presentation materials to support staff.
- Present draft Historic Preservation Ordinance, context statement and historic policy, and community input to board(s).
- 2-4 public hearings before the Planning Commission and City Council anticipated.

- *Deliverables. PowerPoint presentations, draft Ordinance, context statement and historic policy, summary of community engagement and input, and capture all board member comments and directives.*

6. Implementation Plan.

- Develop an Implementation Plan to serve as a roadmap for the success of the new Historic Preservation Ordinance, context statement and historic policy, including new internal processes and documentation for staff.
- Submit draft to the City team for review and revision.
- Provide updates as necessary to respond to staff input and direction to finalize the plan.
- Along with the City team, determine if additional meetings or training is necessary to ensure successful implementation of new Ordinance, policy, and processes.
- Provide training and support to assist staff with the transition and to ensure successful implementation of the new Ordinance, policy, and processes. Review progress and suggest changes for success.

- *Deliverables. Implementation Plan, revisions as requested, meetings if needed, training as needed.*