REQUEST FOR QUALIFICATIONS
HISTORICAL BUILDING INVENTORY SURVEY

RFQ AA08-JM-2615

SUBMITTED BY THE AMHERST PROCUREMENT DEPARTMENT
SPONSORED BY THE FACILITIES & CAMPUS PLANNING DEPARTMENT
THE UNIVERSITY OF MASSACHUSETTS - AMHERST

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1.01 NOTICE OF PROPOSAL

The University of Massachusetts Amherst is seeking to pre-qualify firms specializing in conducting historical building surveys to identify and document the architectural and historical significance, as well as the condition, of a select group of campus buildings.

Proposals shall be received no later than 2:00 PM on Tuesday January 22, 2008. Proposals shall be addressed and delivered to the Procurement Department; Room 407 Goodell Building; 140 Hicks Way; University of Massachusetts Amherst; Amherst, MA 01003-9334; Attention RFQ AA08-JM-2615. Each proposal shall clearly identify the respondent's name and business address. One original, clearly marked as such, and five (5) copies of each proposal shall be submitted to the University. Please print the following in the lower left hand corner of all envelopes and/or packaging:

Historic Building Inventory Survey, RFQ AA08-JM-2615
Proposal Submission Deadline: 2:00 PM, Tuesday January 22, 2008

As a result of this solicitation, the University will review all proposals received and select a minimum of three (3) firms for further evaluation. These firms will be interviewed and may be requested to provide a fee proposal based on a defined scope of services as part of a subsequent Request for Bids. Once the group of firms has been selected for interview, notification will be provided to all firms that have expressed an interest. The University reserves the right to reject any or all proposals as it deems to be in its best interest.

1.02 OVERVIEW

The Amherst campus was originally founded in 1863 as the Massachusetts Agricultural College with approximately 18 structures and barns on more than 383 acres. In 1930, the Massachusetts Agricultural College evolved to the Massachusetts State College, and then in 1948 to the University of Massachusetts Amherst. Currently, the Amherst campus is the flagship and largest campus in the University of Massachusetts 5-campus system. The campus community of 30,000 includes a student enrollment of approximately 24,600 as well as 5,500 faculty and staff. The main campus is comprised of over 1,400 acres and includes over 350 structures and buildings ranging in age from the Stockbridge House built in 1729 to present day construction. There are currently more than 100 buildings and structures that are over 50 years old on campus. Approximately 25 of these buildings have been listed on the Massachusetts Historical Commission (MHC) Inventory. However, the campus does not have a complete record of the documentation related to the listings on the MHC inventory. In addition to the buildings listed in the MHC inventory, there are many other buildings on campus that are architecturally significant including buildings constructed since 1960.

As the campus has evolved to the status of a major public Research I institution, the demand for facilities that support modern research and teaching have increased dramatically. Today, the campus is engaged in
Historical Building Asset Survey Study

The campus is engaged in planning for the next major capital program and is planning to update the campus master plan in the next year. As part of this planning cycle, the campus is initiating this survey to research and document the campus architectural and historical heritage. The information assembled through this process will be integrated into the updated master plan and assure that the value of the campus architectural and historical assets are fully considered in the decisions affecting the future development of the campus.

1.03 PROJECT INTENT AND DESCRIPTION

The intent of the Historical Building Inventory Survey is to review and document the physical development of the campus and produce an accurate, complete and comprehensive evaluation and documentation of the architectural/historical significance and overall condition of a selected group of campus buildings, sites and/or landscape features. The initial step will be to survey the campus to identify, locate and describe the buildings, sites and landscapes that are of historic, architectural or archeological importance to the campus, State or Nation. The main focus of the survey will be on campus buildings that are over 50 years old (approximately 112 buildings) as well as significant modern architecture constructed in the last 50 years (approximately 12 buildings). Following this initial review, buildings, sites and landscapes will be selected for the purpose of conducting a detailed evaluation to document their architectural/historical significance. The selected group will include as a minimum all existing buildings listed on the Massachusetts Historical Commission Inventory and others that are determined through this project to have significant architectural and/or historical value. In addition, the selected group of buildings and sites will be evaluated in regard to their current condition, utilization, required repairs to maintain current condition and potential for utilization or reuse to serve current and future needs at the University. This evaluation will include preliminary cost estimates for preserving the buildings for current utilization and/or for potential reuse. All information will be compiled in a final report and in a historical information data base compatible with the University’s existing and planned facilities information data systems.

The information that is complied and documented will be published in a presentation quality final report and will include drawings, maps, photographs, descriptions and other written material. The results of the survey and final report shall meet or exceed the professional standards established by the Massachusetts Historical Commission. This information will be incorporated into the University’s master plan and will be used by the campus in future facilities planning activities including on-going evaluation and determination of building preservation for use, reuse or if deemed necessary, disposition. The results will also provide the campus with information to help determine if selected buildings should be nominated for listing on the State and/or National Register of Historic Places.

1.04 GENERAL DISCRIPTION OF PROJECT SCOPE

The general scope of work for this project includes but is not limited to the following:

- Research, collect and review all available information relevant to the purpose of the survey from the University (UMA), the Massachusetts Historic Commission (MHC), the Amherst Historic Commission (AHC), Preserve UMASS Amherst (PUMA), the Historic American Buildings
Survey (HABS), the Historical American Engineering Record (HAER) and others that have relevant information. This information will provide an understanding of the physical and cultural development of the Amherst campus from its beginning to present.

- Conduct site visit(s) to the campus for a general survey of all campus buildings and sites for the purpose of identifying the group of buildings and sites that have historic, architectural or archeological significance. The site visits will include meetings with University officials to present initial findings and to collect and review information related to current challenges and plans for the future development of the campus. Following a review of all collected information, the results of the site visits and in consultation with the University, select the appropriate group of buildings and sites for the detailed assessment. The selected group will include all buildings on the MHC inventory as well as other buildings selected by the campus based on recommendations resulting from the general survey.

- Conduct a detailed survey and assessment of the selected group of buildings and sites. Research, collect and document all existing historical archival information and review all other related data sources for these buildings. The following is included as a minimum:
  - Compile a complete inventory of information including drawings, maps, articles, writings, photos, etc. of campus buildings and landscapes contained in the University’s archives, the Massachusetts Historical Commission archives, the Amherst Historical Commission and other sources that may exist as a result of the research.
  - Compile and document information related to the criteria for eligibility for inclusion in the State and National Registrations of Historical Places.
  - Compile and document the advantages and constraints, from a building owner perspective, of placing qualified structures on the State and National Register of Historic Places.
  - Conduct a facilities condition assessment and document results to identify general deficiencies, utilization, past alterations, potential for preservation and preliminary cost to repair deficiencies and/or restore for reuse.
  - Determine which buildings are eligible for listing on the State or National Historic Register.
  - Build a photo database with description of significant findings to include in report.

- Conduct public meeting(s) to describe the survey process, goals and findings. Meeting(s) will include appropriate representatives from the University, the MHC, the AHC, and PUMA and other interested parties.

- Prepare a draft report for each building and/or site that:
  - Describes its significance – architectural, associative, historical, educational, and other.
  - Presents documentation of its historic and current appearance including drawings, photographs and written material.
  - Identifies potential nominees for eligibility to the State and National Registers.
  - Describes its current condition and projected longevity.
  - Determines feasibility of repair/rehabilitation/preservation.
  - Describes adaptive re-use potential including a change of use potential and general code implications.
  - Recommend options for repair/rehabilitation and/or preservation for reuse.
  - Preliminary cost estimates for recommended repair/rehab/preservation options.
  - Relocation potential and approximate cost.

- In consultation with the University, prepare a professional quality final report that provides a well written executive summary and includes all material, findings and conclusions of the survey.

1.05 CONSULTANT TEAM

The University will select and contract with a prime consultant who may have all required disciplines in-house under the management of one firm or a prime consultant with independent sub-consultants coordinated and managed by the prime consultant. The prime consultant will be responsible for reviewing
and coordinating all work to provide well organized and professional quality final products and deliverables. The consultant team must include qualified professionals in the following disciplines as a minimum:

- Registered Architect
- Registered Structural Engineer
- Historic Preservation Specialist
- Code Consultant
- Construction Cost Estimator

Other consultants and specialists may be required to accomplish the survey intent and can be retained as a reimbursable expense as needed and subject to approval by the University. The University will require the prime consultant to provide a minimum of three quotes from qualified professionals for approval of reimbursable consultant services.

1.06 QUALIFICATION SUBMISSION REQUIREMENTS

Proposers shall submit five (5) copies of each proposal to the University. Submittals shall include the following information:

1. Description of the Prime Consultant
   History and description of the prime consultant firm including principal business of the firm and complete description of in-house services. Include the total number of personnel and the disciplines employed by the firm and the number of personnel holding professional registrations.

2. Qualifications of the Prime Consultant
   Provide a summary description of the unique qualifications of the prime consultant to provide services for this contract.

3. Qualifications of Consultant Team and Project Organization
   Provide an organizational chart showing the prime consultant and each sub-consultant. Identify the Principal-in-charge, Project Manager, and/or Team Leader from the prime consultant that will have overall responsibility for completion of the project. Identify all key personnel from the sub-consultants or others that will work on this project. Include resumes for all key personnel identifying their educational background and relevant experience that qualifies them to provide the services required under this contract. Respondent must meet the Secretary of the Interior’s Standards for Professional Qualifications applicable to this RFQ, which can be viewed online at http://www.nps.gov/history/local-law/arch_stnds_9.htm.

4. Project Experience
   Provide a list and description of all similar project experience completed in the last five years for all of the key personnel from the prime consultant and all sub-consultants that demonstrate the consultant team qualifications to perform services under this contract. Include experience working on a University or College campus. Identify the roles that key personnel played in each example. Similar project experience shall include the following as a minimum:
   - Name of project
   - Owner representative
   - General description and scope of the project
   - Period of performance
   - Principal-in-charge or consultant team leader of project

5. Project Approach
Provide a brief synopsis of the consultant teams approach to this project based on experience with other similar projects.

6. **Current and/or Previous Client List - References**
   Provide a list of current and/or previous clients identifying persons familiar with your work references with complete contact information that can provide references for the professional qualifications of the prime consultant and sub-consultant team members.

7. **Additional Information**
   Provide any additional information that describes the consultant teams qualifications beyond the specific requirements stated above that will help the University to evaluate the qualifications of the consultant team submittal.

1.07 **PROJECT SCHEDULE**

Please provide a proposed schedule for completion of the scope of work identified in this Request for Qualifications.

1.08 **EVALUATION CRITERIA**

A Selection Committee representing the University will review the proposals and select the proposals that best meet the needs of the University. The evaluation will include, but will not necessarily be limited to, the following, in rank order of importance to the University:

1. Professional qualifications of the prime consultant and the sub-consultant team.
2. Demonstrated experience of the prime consultant and sub-consultants in providing and completing consultant services for similar projects.
3. Quality of work provided on similar projects.
4. Demonstrated ability of the prime consultant to organize and coordinate sub-consultants in the delivery of similar consultant services.
5. References from current and/or previous clients.
6. Previous experience working with State, Federal and/or local historical commissions.
7. Previous experience working with Universities and/or other educational institutions.

The proposals will be evaluated based on a point system. The criteria and their assigned points will be placed in a sealed envelope in the bid file prior to the bid opening date and time, for use by the Selection Committee during the award process.

Information submitted in response to this RFQ will be public record at bid opening and after contract is awarded.

1.09 **QUESTIONS FROM PROSPECTIVE DESIGNERS**

All questions from prospective firms concerning this RFQ shall be referred to the Director of Procurement, by email or fax only, by 5:00 PM, Friday, January 11, 2008. The contact information for this individual is:

John O. Martin, MCPPO
Director of Procurement
University of Massachusetts - Amherst
Fax: (413) 545-1643
E-mail:jomartin@admin.umass.edu

Inquiries received after the specified date and time will not be accepted. The University will issue an
addendum to all prospective proposers as required and deemed necessary by 5:00 PM on Tuesday, January 15, 2008.

1.10 CONTRACT

The Consultant Team selected thru the RFB process will be required to enter into a standard University Contract for Services. A sample copy of the standard contract, including all Terms and Conditions, will be provided to the consultant teams selected as a result of this Request for Qualifications as part of the subsequent Request for Bids. A copy can be viewed at:
http://www.umass.edu/procurement/Fill-In_Forms/CFS-L051407.pdf

1.11 BIDDER AFFIRMATION

By Signature Hereon,

A. Bidder affirms that he/she has not given, offered to give, nor intends to give at any time hereafter any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, or service to a public servant in connection with the submitted proposal. Failure to sign the bid may, or signing it with false statement shall, void the submitted bid or any resulting contracts, and the vendor will be removed from all bid lists.

B. Vendor affirms that no affiliation exists between owners, officers, administrators, or employees of the bidder and the University which could be construed as a conflict of interest.

C. Vendor has not received compensation for preparation of the specifications for this RFQ.

Company Name: ________________________________________________________________

Address: ______________________________________________________________________

Submitted By (Please print): ______________________________________________________

Signature: __________________________ Date: __________________________

Fax #: __________________________ Telephone #: __________________________

Email Address: __________________________

*** END OF REQUEST FOR QUALIFICATIONS***