

ATTACHMENT C: SCOPE OF WORK

Objective: The goal of this project is the update and refinement of the *Design Guidelines for Raleigh Historic Districts (Guidelines)*. The project will be participatory and advertised to the community-at-large.

Since the last *Guidelines* update was adopted in 2001 (based upon initial drafts developed in 1995), the RHDC has identified several key historic preservation issues where the *Guidelines* do not provide clear direction:

- archaeological sites;
- cemeteries;
- post-World War II and Modern (1945-65) architecture;
- infill downtown urban commercial architecture;
- language related to review of individual historic landmark sites;
- sustainability; and
- evaluation of new alternative or substitute materials;

as well as a number of smaller policy adjustments, omissions, and glossary additions.

The scope of work for this project includes four phases:

PHASE 1: PLANNING

Task 1.1: Review Group Roundtable

The Consultant will meet with the Review Group (hereinafter “Group”) to discuss general approach and goals of the revised guidelines.

Task 1.2: Guidelines Analysis

The Consultant will perform an analysis of existing guidelines and review of comparative guideline models as well as current best-practice principles for the protection, maintenance, rehabilitation, and/or use of the historic preservation issues listed above.

Task 1.3: Public Input and Visioning Strategy

In consultation with Group and staff, the Consultant will develop a public input and visioning strategy to best determine the community’s preservation values and design goals.

PHASE 2: PUBLIC OUTREACH AND VISIONING

Task 2.1: Public Meeting and Input

The Consultant will solicit input from the community-at-large and representative stakeholders through focus groups and/or public workshops.

PHASE 3: GUIDELINES REVISIONS AND REFINEMENT

Task 3.1: First Draft

The Consultant will prepare guidelines text, photographs, and/or illustrations for new and revised sections. Consultant will coordinate design vocabulary and illustrations with new development code.

Task 3.2: Review of First Draft

The Consultant will meet with the Group to review draft guidelines.

Task 3.3: Second Draft

The Consultant will prepare second draft.

Task 3.4: Public Information Meeting

The Consultant participates in public information meeting held by RHDC.

Task 3.5: Public Comment Incorporation

The Consultant will analyze and incorporate public comment as appropriate.

Task 3.6: Review of Second Draft

The Consultant will meet with the Group for reviews of draft guidelines.

PHASE 4: PREPARATION OF FINAL PRODUCTS

Task 4.1: Final Product

The Consultant will provide electronic copy of the final product text in appropriate formats, original illustrations (drawings and/or photographs), and three originals of the final guidelines (one to the RHDC and two to the HPO); the final product will be for online and print publication.

Design Guidelines Update SCHEDULE

Time Period	Product
September 30, 2010 – October 30, 2010	<i>Phase 1: Planning</i> <ul style="list-style-type: none">• Consultant meets with RHDC staff and Review Group (hereinafter “Group”) to discuss general approach and goals of the revised guidelines• Consultant analyzes existing guidelines and comparative guideline models as well as current best-practice principles for issues identified by RHDC staff and Group• In consultation with RHDC staff and Group, consultant develops a public input and visioning strategy to best determine the community’s preservation values and design goals
November 1, 2010 – December 1, 2010	<i>Phase 2: Public Outreach and Visioning</i> <ul style="list-style-type: none">• Consultant solicits input from the community-at-large and representative stakeholders (1-2 focus groups and/or public workshops)
December 1, 2010 – February 1, 2011	<i>Phase 3: Guidelines Revision and Refinement</i> <i>(1st draft)</i> <ul style="list-style-type: none">• Consultant prepares guidelines text, photographs, and/or illustrations for new and revised sections• Submit copy to HPO for review and comment• Consultant meets with the Group for reviews of draft guidelines (2 meetings, late January); consultant provides agendas for and leads discussions during meetings
February 1, 2011 – mid-March, 2011	<i>Phase 3: Guidelines Revision and Refinement</i> <i>(2nd draft)</i> <ul style="list-style-type: none">• Consultant submits copy to HPO for review and comment• Consultant participates in public information meeting held by RHDC• Public review and comment period; consultant analyzes public comment and incorporates as appropriate• Consultant meets with the Group for review of draft guidelines (1 meeting, mid-March); consultant provides agenda for and leads meeting
May 13, 2011	<i>Phase 4: Preparation of Final Products</i> <ul style="list-style-type: none">• Consultant prepares and submits electronic copy of the final product text in appropriate formats, for online and print publication, along with original illustrations (drawings and/or photographs) and three originals of the final guidelines (one to RHDC and two to the HPO)

ATTACHMENT C

**NORTH CAROLINA HISTORIC PRESERVATION OFFICE
HISTORIC PRESERVATION FUND SUBGRANT PROJECT OUTLINE AND BUDGET**

Historic Preservation Fund Grant Award Year: 2010

Grantee: City of Raleigh

Project Name and Type: Design Guidelines for Raleigh Historic Districts Update

Grantee Contact Person, Address, Telephone, Fax, and E-mail:

Name: Dan Becker

Commission: Raleigh Historic Districts
Commission

Address: PO Box 829 Century Station

Address:

City/State/Zip: Raleigh, NC 27602

Telephone: 919-516-2632

Fax: 919-516-2682

Email: dbecker@rhdc.org

HPO Project Specialist: Jeff Adolphsen, 919-807-6572; mitch.wilds@ncdcr.gov

Grant Period Beginning May 1, 2010 and Ending August 31, 2011 (no option to extend)

Project contracts under the Grant Contract shall end no later than: August 19, 2011 (no option to extend)

Total Cost: \$22,000

Federal Funds: \$12,000

Local Match: \$10,000

Cash: \$10,000

In-kind: -0-

Budget:

Consultant's Fee: \$22,000

Project Description:

The City of Raleigh will hire a consultant to update of their design guidelines, last updated in 2001 and based on drafts developed in 1995. The Historic Districts Commission plans to have the consultant address issues not clearly defined or covered by the current guidelines. This will include cemeteries, post WWII and Modern (1945-65) architecture, infill downtown urban commercial architecture, sustainability, and new alternative or substitute materials. The update will also assist the city in the stewardship of several historic properties, and archaeological and cemetery sites "by outlining current best-practice principles for use in their protection and maintenance."

The updated guidelines will be posted on the Raleigh Historic Districts web site by the end of the grant contract period, which is August 19, 2011.

The consultant will submit final drafts of all products to the Historic Preservation Office no later than August 19, 2011. The project will be accomplished under the supervision of the HPO Office of Archives and History. Both HPO supervisory staff and the consultant will meet 36 CFR 61 qualifications.

ATTACHMENT D

Services To Be Provided and Standards To Be Followed

Revision of Design Guidelines

I. SERVICES AND GOODS PROVIDED BY THE CONSULTANT AND STANDARDS AND PROCEDURES TO BE FOLLOWED BY THE CONSULTANT:

The Consultant will revise and update design guidelines for alterations, additions, new construction, moving, and demolition in locally designated historic districts and/or landmarks according to guidelines established by the Office of Archives and History (Office) and with the guidance and support of the Local Contract Administrator, the local Review Committee, and the State Historic Preservation Office. The design guidelines shall not be inconsistent with the applicable *Secretary of the Interior's Standards for Archaeology and Historic Preservation*, specifically, the *Secretary of the Interior's Standards for the Treatment of Historic Properties*. For conventions of grammar, citations, bibliography, and punctuation, all materials should follow the most recent editions of the *Chicago Manual of Style* and the Office's *Guide for Authors and Editors*.

For the purposes of payment and the satisfaction of the terms of this contract, it is understood that the Consultant will accomplish the following items:

1. provide analysis of existing guidelines and review of comparative guideline models;
2. prepare guidelines text, photographs, and/or illustrations;
3. provide electronic copy of the final product text in appropriate format, original illustrations (drawings and/or photographs), and a photocopy of the final text;
4. provide agendas for and lead discussions during Review Committee meetings; and
5. attend at least one public information meeting to be held by the Grantee.

The Consultant shall seek and obtain professional assistance from the HPO in defining the content, reviewing drafts, editing for form and content, and making suggestions for assuring the quality of the guidelines. HPO preservation and restoration specialists will be assigned to work directly with the Consultant to provide assistance and guidance throughout the project. The Consultant shall obtain the required review and approval by the HPO of all project products to assure compliance with North Carolina laws and adherence to accepted professional preservation standards and practices, in accordance with the Time-Product-Payment Schedule.

The Consultant and Local Contract Administrator will notify the Review Committee and the HPO project specialist thirty days in advance of all meeting dates and times. At least two weeks in advance of scheduled meetings, the Consultant will send drafts for review by the Review Committee to the Local Contract Administrator for distribution to the Review Committee and shall provide drafts to the HPO project specialist two week in advance of scheduled meetings. The Consultant shall attend meetings with the Review Committee in accordance with the Time-Product-Payment Schedule.

At the end of the project, the Consultant will submit to the HPO a paper copy of the final guidelines in final design and layout form, including illustrative materials, before final payment is approved. The Consultant will provide the Grantee an original hard copy of the final guidelines as well as on computer disk. The Consultant will also submit all original illustrations (photographs, drawings, maps) to the Grantee.

The Consultant shall have the option to use the HPO's photo lab services. The Consultant may request the HPO to process and print black and white photographs at HPO cost, based on a cost list provided for various photography items by the HPO, with the understanding that consideration will be given by the HPO to process photographs quickly to expedite projects, but problems of labor and supplies sometime generate long backlogs and a three-week processing time is usual, but sometimes six weeks to two months may occur.

The Consultant agrees to pay all invoices for HPO photo lab services associated with the grant project prior to the Agency's approval of the consultant's final payment as set forth in the Time-Product-Payment Schedule.

II. SERVICES AND GOODS PROVIDED BY THE GRANTEE:

To ensure that the project will operate efficiently on the local level for the Consultant, the Grantee agrees to do the following:

1. provide an electronic copy of Grantee's existing guidelines to the Consultant;
2. distribute drafts to the Review Committee;
3. review phased drafts prior to scheduled meetings to ensure meaningful discussion and input at the meeting;
4. lead public information meeting(s);
5. conduct project administration and accounting, to include reviewing project products and making timely payments to the Consultant in accordance with the Time-Product-Payment schedule;
6. monitor the schedule closely to ensure that deadlines established in the project are met;
7. if a part of the project budget, provide adequate office space for the Consultant, including a telephone and desk; and
8. provide Consultant and the HPO with four (4) copies of the final printed product.
9. post the Consultant's final draft on the Raleigh Historic Districts' web site.