

**REQUEST FOR PROPOSALS**  
City of Madison, Wisconsin  
**HISTORIC PRESERVATION PLAN**

**DRAFT**  
**April 14, 2016**

**INTRODUCTION**

The City of Madison is accepting proposals from qualified consultants to prepare a creative and forward-looking comprehensive Historic Preservation Plan that will provide the framework for a more complete approach to the historic preservation program in Madison. The City adopted its first historic preservation ordinance and created the Landmarks Commission in 1970. Since that time, the City has designated 182 landmarks and created 5 local historic districts. In July 2015, the Common Council unanimously adopted the first major revision to the ordinance in 40 years. Now, the City would like to broaden its efforts beyond the traditional regulatory focus to a more dynamic and comprehensive program.

The consultant budget for this project should not exceed \$150,000. In addition, the City has received Certified Local Government Historic Preservation Subgrant funding from the Wisconsin Historical Society in the amount of \$8,500 to provide an intensive survey in an around Myrtle Street near Eken Park. The consultant's scope of services may be revised to accommodate the work of this grant.

All work performed shall be consistent with the National Park Service's Secretary of the Interior's Standards for Archeology and Historic Preservation, and the Standards for Identification and Evaluation (Federal Register, September 29, 1983, as revised 1995) by qualified lead professionals meeting the Secretary of the Interior's Professional Qualification Standards (36 CFR61) and the Wisconsin State Historic Preservation Office's Survey Manual.

The City of Madison is positioned to expand its preservation program to achieve the following:

- Promote a community culture that values historic preservation
- Articulate the City's long range historic preservation goals
- Identify and evaluate historic resources
- Revise and update the ordinance requirements and standards for each of the 5 local historic districts
- Influence preservation-related recommendations in adopted City plans
- Form the basis of the historic preservation component of the City's Comprehensive Plan 2016 update

**SCOPE OF SERVICES**

This scope of services is provided as a guideline to indicate a desired process. Consultants may suggest variations from this scope if they feel it will result in enhanced community participation, a more efficient but thorough process, and/or a better end product. More specifically, the Historic Preservation Plan shall include the parts identified in the scope of services and any other elements that the consultant finds would benefit the historic preservation program that is unique to the City of Madison. The following parts should be considered major components of the project, but are not single discrete projects and are expected to be happening simultaneously as necessary:

## **Part A: HISTORIC RESOURCES DATA**

The consultant shall include in their proposal a recommended strategy for collecting foundation data to identify and evaluate historic resources to meet the needs of the City of Madison. At a minimum, the historic resources foundation data should include the following:

- **Historic contexts.**  
The consultant will update historic context research from the 1994 Madison Intensive Survey: Themes, Architects, and Styles documents. The consultant will analyze the data from the 1994 intensive survey findings and updated historic contexts to discover connections, diverse histories and cultures, significant patterns and trends, and associated property types and related characteristics. The consultant may identify additional context statements to be developed as an ongoing component of the City's historic preservation program. The updated historic context statements will be used to inform survey methodology and determine survey areas.
- **Local history research.**  
The consultant will also conduct local history research using the previously compiled information and updated context statements with specific interest in researching inclusive histories (with particular emphasis on the influence of multicultural communities and women) which will potentially lead to the identification of additional historic resources.
- **Historic resource survey.**  
The consultant will conduct a historic resource intensive survey in areas primarily constructed prior to 1950 that have not been surveyed and will update the historic resource intensive survey in areas that have previously been surveyed. All other areas of the city built prior to 1980 shall be surveyed at a reconnaissance level and the information gathered will establish a recommendation for future intensive survey work. The City will develop a survey database using technology based interactive applications to meet Wisconsin Historical Society AHI/WHPD and City data collection requirements with the assistance of volunteer surveyors and consultant management and analysis of survey information; however, the city will consider an alternate plan to complete the survey that is more cost and time efficient that will provide the City with a similar final product. The consultant will also follow Architecture and History Inventory/Wisconsin Historic Preservation Database (AHI/WHPD) guidelines. The City received a CLG grant to complement this survey effort. The consultant shall incorporate the survey information provided by the CLG grant.
- **Historic resource identification and evaluation.**  
The consultant will use the information from the survey findings to identify and evaluate historic resources, evaluate existing historic districts and landmarks, identify potential landmarks and historic districts, and identify potential conservation districts.
- **Local preservation trend assessment.**  
The consultant will assess what resources are threatened and where the resources are located to identify patterns of development pressure. The consultant will also assess the reasons that the historic resources are targeted for redevelopment. With these findings, the consultant will prioritize redevelopment trends to map out potential threats and opportunities. These trends will also allow the consultant to recommend policy changes and goals for historic preservation.

**Part A:** It is estimated that Part A will require approximately 30% of the total consultant resources.

**DELIVERABLES:**

The consultant will provide a written strategy for collecting foundation data that will be used to conduct a historic resource survey for review and approval by staff and the Landmarks Commission.

The consultant will provide a written historic resources report which will include the following:

- Historic context statements and related goals and priorities.
- Local history information with discoveries in inclusive histories.
- Historic resource survey report describing evaluation and identification.

The consultant will update the Wisconsin Historical Society AHI/WHPD.

The consultant will provide the City with all survey sheets, inventory forms, photographs of historic resources, and all other information acquired during this project.

**Part B: PUBLIC ENGAGEMENT STRATEGY**

Madison has a well educated, active, and engaged citizenry. Part B of this project involves developing a complete public engagement strategy that will actively involve partners and determine the values to guide the entire Historic Preservation Plan process. It is the expectation of the City that the public engagement strategy will be occurring during all parts of the project. At a minimum, the public engagement strategy will include the following:

- Identify volunteers, stakeholders and partners.  
The consultant will assist with the identification of survey volunteers, advocacy groups, interested parties, partners and stakeholders that should be involved in the planning process with particular effort to include multi-cultural communities.
- Prepare education and outreach methodology.  
The consultant will prepare an exciting and innovative public engagement strategy which will include the preparation of meeting presentations, meeting schedules, press releases, social media tools, publicity and engagement strategies, etc. It is expected that the consultant will make findings available to the public on the City project website (with assistance from City staff) and by using other engagement tools in a timely manner so that the public can evaluate and gauge progress.
- Conduct public engagement and education meetings.  
The consultant will conduct several meetings (minimum of 6) to educate and engage the public and City staff throughout the planning process. These meetings will engage the public in the call for research information (photographs, oral histories, etc.) with particular emphasis on the influence of multi-cultural communities and women and will coordinate community value statements which will frame and focus the development of the Historic Preservation Plan.
- Conduct public meetings related to historic preservation ordinance revisions.  
The consultant will conduct a minimum of 3 public meetings for each of the 5 local historic districts to discuss the community value statements and the existing ordinance standards related to that district. Please refer to Part D.

- Conduct public meetings related to Historic Preservation Plan preparation.  
The consultant will conduct several meetings (minimum of 3) to provide information to the public and to City staff on preservation trend findings, development of goal and objectives, and implementation strategies. Please refer to Part C.

<b>Part B:</b>	It is estimated that Part B will require approximately 15% of the total consultant resources.
<b>DELIVERABLES:</b>	
The consultant will develop a written Public Engagement Strategy that includes a plan for each distinctive part of the Historic Preservation Plan process for review and approval by staff and the Landmarks Commission.	
The consultant will provide a series of community value statements including the process and rationale for why the statements were proposed and how the statements should be used to provide direction for subsequent parts of the Historic Preservation Plan process.	

**Part C: HISTORIC PRESERVATION PLAN**

Based on the historic resource data and community value statements, the consultant will prepare a plan document that will, upon completion, be adopted by the Common Council and will provide policy direction and plan implementation recommendations.

- Establish Goals and Objectives.  
The City of Madison is interested in expanding its preservation program by establishing long term historic preservation goals and objectives. In addition to the list of tasks above which may be included as goal and objectives, the consultant may add goals and objectives as determined by the community value statements created for this purpose and as determined by their previous experiences working with communities on historic preservation plans.
- Recommend Implementation Strategy.  
The consultant will prioritize goals and objectives to guide the implementation strategy. The consultant will prepare draft implementation strategy including an indication of responsible parties, timing and deadlines, estimated cost, and proposed source of funding. The recommendations shall be ranked in priority order. This strategy should also clarify how the plan is to be used by the City and it should include guidelines for amendments or updates of the plan. The following items relate to items that have previously been identified by the City for inclusion in the Historic Preservation Plan:
  - Strategies to integrate historic preservation program into public policy.
  - Land use management tools (zoning code, historic property variances, demolition standards, etc.) to help achieve the goals and objectives of the plan.
  - Economic development strategies to help achieve the goals and objectives of the plan.
  - Financial incentives (historic preservation fund, demolition fees, façade improvement grants, etc.) to help achieve the goals and objectives of the plan.
  - Sustainability strategies to help achieve the goals and objectives of the plan.
  - Historic preservation objectives of city-wide heritage tourism program.
  - Education and outreach offerings for public and staff (maintenance brochures, FAQ for each historic district on the web site, walking tour brochures, real estate

professionals training, architect training, spring letter, new property owner letter, alderperson/city staff training, historic preservation month lectures and awards, interactive website, etc.).

- Draft Historic Preservation section of the Comprehensive Plan.
- Designate and interpret historic resources.

<b>Part C:</b>	It is estimated that Part C will require approximately 20% of the total consultant resources.
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<b>DELIVERABLES:</b> The consultant will prepare (with assistance from City staff) a creative and forward-looking comprehensive Historic Preservation Plan document that will include all of the information gathered in the various parts of the planning process and an Implementation Strategy which identifies short-, mid-, and long-term action strategies, responsible parties and opportunities in timing, funding, and in public-private collaborations to achieve desired outcomes. The Plan will include photographs, illustrations, maps, and other graphics as appropriate to effectively communicate policies and findings. The consultant will present the final Plan to the Landmarks Commission, other committees and commissions as identified during planning process, and the Common Council.
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**Part D: UPDATE HISTORIC PRESERVATION ORDINANCE FOR EACH LOCAL HISTORIC DISTRICT**

The process to update the five individual historic district sections of the ordinance is a high priority for the City. The consultant will facilitate public meetings and develop revisions to the five local historic district sections of the Historic Preservation Ordinance (MGO Chapter 41) and present the recommendations to the Landmarks Commission and the Ad Hoc Landmarks Ordinance Review Committee. The consultant will conduct public meetings necessary for each historic district to fully discuss the community values, issues with the existing ordinance standards related to each district, and proposed ordinance revisions.

Depending on the schedule, the consultant may also be asked to attend the Common Council meeting where the revised ordinance is considered for adoption.

The consultant shall make findings available to the public on the City project website (with assistance from City staff) and by using other engagement tools in a timely manner so that the public can evaluate and gauge progress.

<b>Part D:</b>	It is estimated that Part D will require approximately 35% of the total consultant resources.
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<b>DELIVERABLES:</b> The consultant will provide a draft of proposed revisions to each of the five local historic district sections and recently adopted sections of the Historic Preservation Ordinance (MGO Chapter 41).  Depending on the schedule, the consultant may also be asked to attend the Common Council meeting where the revised ordinance is considered for adoption.
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