



# Memorandum

**TO:** HONORABLE MAYOR  
AND CITY COUNCIL

**FROM:** Rosalynn Hughey

**SUBJECT: HISTORIC RESOURCES SERVICES  
CONSULTANT MASTER  
AGREEMENTS**

**DATE:** January 13, 2020

Approved

Date

1/17/2020

## RECOMMENDATION

- a) Accept the report on the Request for Proposal (“RFP”) for consultants to assist with the historic resources services and other City projects including adoption of a resolution authorizing the City Manager to execute Master Agreements for consultants to provide historic resources services for an initial five-year term ending January 2025, with the following consultants for a maximum aggregate compensation not to exceed \$1,400,000 for all Agreements, subject to the appropriation of funds.

	<u>Vendor Name</u>	<u>Maximum Compensation</u>
1.	AECOM Technical Services, Inc.	\$100,000
2.	Architectural Resources Group, Inc.	\$100,000
3.	Archives & Architecture, LLC	\$100,000
4.	Dudek	\$100,000
5.	Environmental Science Associates	\$100,000
6.	Garavaglia Architecture, Inc.	\$100,000
7.	Galvin Preservation Associates, Inc., dba GPA Consulting	\$100,000
8.	Interactive Resources, Inc.	\$100,000
9.	MacRostie Historic Advisors, LLC	\$100,000
10.	Michael Baker International, Inc.	\$100,000
11.	Page & Turnbull, Inc.	\$100,000
12.	Stantec Consulting Services, Inc.	\$100,000
13.	SWCA, Inc., dba SWCA Environmental Consultants	\$100,000
14.	TreanorHL, Inc.	\$100,000

- b) Execute amendments to the Master Agreements to increase or decrease the maximum compensation of each agreement, not to exceed the aggregate compensation amount for all of the agreements.
- c) Exercise up to three (3) one-year options to extend the term of the Agreements through January 2028, subject to the appropriation of funds.

## **OUTCOME**

Provide Historic Survey and on-call Historic Consultant Services to the City on an as-required basis. Consultants shall assist the Planning, Building and Code Enforcement Department (PBCE) and other City Departments to: 1) identify historic resources prior to development application submittals enabling developers to plan for adaptive reuse of historic structures; and 2) provide on-call historic consultants to assist staff in the review and assessment of private and public development projects (“historic resource services”). These lists of historic resource consultants are for City work only.

## **BACKGROUND**

On September 19, 2017, the City Council<sup>1</sup> approved the Administration’s plan to use \$487,500 in fees, fines, and donations collected by the City to procure consulting services to survey structures that are potentially eligible for historic designation and to hire a Historic Preservation Officer to manage the survey. The Historic Preservation Officer has developed a historic survey strategy. The strategy involves applying for grant funding, establishing a short list of pre-qualified and available historic resource consultants, and developing a list of priority areas and themes based on need and development pressures.

The priority is to update the 1992 Citywide Historic Context Statement which will help to streamline and focus the survey work. This task is being partially funded by a grant from the State Office of Historic Preservation. Priority areas for survey work include South First Street, North First Street, Alviso, Saint James Square, Pre-1929 Horticulture uses, Urban Village areas, historic neighborhoods and districts, and other areas and themes throughout the entire city. Although the available funding is not expected to be sufficient to cover all survey needs, it will help to leverage other potential funding from outside sources.

At this time, the cost for survey work cannot be projected since not enough recent survey work has been done to estimate costs. As survey work is completed, cost estimates will be developed for future phases. The survey will cover the period from 1850 to 1979 but will prioritize updating the current Historic Resources Inventory. The Historic Landmarks Commission will participate in reviewing the survey work. All survey work will involve community engagement.

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<sup>1</sup>Council Memo dated 09/06/17:

<https://sanjose.legistar.com/View.ashx?M=F&ID=5413057&GUID=5BA73405-77B4-4836-BF38-0F9D56A89A12>

**ANALYSIS**

The Request for Proposal (RFP) for Historic Resources Services was published through the City’s e-procurement system in June 2019. The RFP requested proposals from consultants to assist the City with planning efforts in two technical areas. To optimize resources and efficiency, staff consolidated both technical areas into one RFP instead of conducting separate procurements to create a pool of consultants in both disciplines to provide service on an as-needed basis. A total of 75 companies viewed the RFP, and 18 proposals were received by the City for one or both of the two technical areas. The proposals were evaluated by a three-member team of representatives from the Planning, Building and Code Enforcement Department. Each team member independently evaluated and scored the materials. The overall scores (based on 100 maximum points) for each finalist in the respective technical areas are reflected in the following table:

<b>Rank</b>	<b>Citywide Historic Resources Survey (9)*</b>	<b>On-Call Historic Resources Services (17)*</b>
1.	Archives & Architecture (81.7) <sup>L/S</sup>	Archives & Architecture (86.5) <sup>L/S</sup>
2.	Garavaglia Architecture (81)	GPA Consulting (82.8)
3.	Page & Turnbull (78)	Page & Turnbull (82.5)
4.	Environmental Science Assoc. (77) <sup>L</sup>	Environmental Science Associates (78.3) <sup>L</sup>
5.	Stantec (76.7) <sup>L</sup>	Architectural Resources Group (78)
6.	Michael Baker International (68.3)	Garavaglia Architecture (77.2)
7.	TreanorHL (67.3)	TreanorHL (74.8)
8.		Dudek (71.3)
9.		SWCA Environmental Consultants (71.3)
10.		Michael Baker International (69.8)
11.		MacRostie Historic Advisors, LLC (69) <sup>L/S</sup>
12.		AECOM (68.2) <sup>L</sup>
13.		Interactive Resources (66.5)

\*Total number of proposals received for the specific technical area

<sup>L</sup> Consultant received Local Business Preference

<sup>S</sup> Consultant received Small Business Preference

**Local and Small Business Preference:** In accordance with City policy, five percent of the total evaluation points were reserved for local business preference and five percent were reserved for small business preference. Five (5) proposers requested and received consideration for local business preference (four (4) of which were finalists). Three (3) proposers requested and received consideration for small business preference (two (2) of which were finalists). Except for one proposal, the receipt of preference points was not determinative in becoming part of the pool.

***Protest Period:*** The RFP process included a 10-day protest period that commenced when consultants received the City's Notice of Intended Award. No protests were received.

***Award Recommendation:*** Staff recommends a total of fourteen (14) contract awards to the highest scoring proposals as demonstrated above for their experience, expertise, and qualifications. This number of selected consultants is required to ensure that Planning staff has adequate expertise and flexibility to address all of the activities, size, scope and workload for each of the technical areas. Having 14 historic resources consultants on the City's list of qualified consultants provides the City access to a wide portfolio of historic and survey expertise and approaches from which staff can select the firm that best meets identified needs. Also, during ramp-up for implementation, several projects may be initiated concurrently and necessitate using multiple consultants at the same time.

Two consultant short lists will be established. The first list includes seven (7) consultants for historic survey work to be paid for by the Survey Fund and other appropriated funds as authorized by City Council. The second list includes thirteen (13) consultants available to provide on-call historic consultants to assist staff in the review and assessment of private and public development projects. The proposed agreements with historic resource consultants would not be performing work on behalf of private applicants. A separate list of qualified historic resource consultants interested in working in the City of San Jose is maintained by PBCE as an aid to private applicants.

***Summary of Agreements:*** Staff is requesting authority to execute Master Consulting Agreements with 14 consultant firms for Historic Resources Services for both technical areas.

The initial term of the agreements is for five (5) years with options to extend the agreements for three (3) additional one-year terms to provide ongoing consultant services, if required. The cost for the option years after the initial five-year term shall be based on renewal quotes from consultants and any requests for compensation increases must be justified by the consultant and are subject to approval by the City and the annual appropriations of funds. Increases shall not exceed 3% annually.

***Use of Services:*** It is not anticipated that the City would contract the full maximum aggregate compensation of \$1,400,000 over the term of the agreements. The maximum compensations proposed for each firm would allow the City to potentially contract with the same firm for multiple assignments. The purpose of executing master agreements with 14 firms in these technical areas is to provide the City with flexibility to hire the firm or consultant team with the right experience and expertise to meet the identified needs of a given planning process or study, when this process or study is funded and initiated. Additionally, as appropriate, this list of vendors/consultants may be used to provide services for other City projects through various Departments.

## **CONCLUSION**

The approval of the two sets of historic survey and on-call historic consulting master agreements will allow PBCE to refine and update the current Historic Survey Strategy Work Program and further advance the key component of completing the City's historic resources inventory.

## **EVALUATION AND FOLLOW-UP**

This memorandum will not require any follow-up from staff.

## **CLIMATE SMART SAN JOSE**

The recommendation in this memorandum has no effect on Climate Smart San José energy, water, or mobility goals. Adaptive reuse of historic buildings is a known green building strategy.

## **PUBLIC OUTREACH**

This memorandum will be posted on the City's Council Agenda website for the January 28, 2020 Council Meeting.

## **COORDINATION**

This memorandum has been coordinated with the City Attorney's Office and City Manager's Budget Office.

## **COMMISSION RECOMMENDATION/INPUT**

No commission recommendation or input is associated with this action.

## **COST SUMMARY/IMPLICATIONS**

The recommended actions in this memorandum will allow for the execution of Master Agreements for an aggregate amount not to exceed \$1,400,000. The budget for these agreements is included in the following appropriation: Planning, Building and Code Enforcement – Historic Preservation (Appn #3132). The ability to spend against these agreements is subject to the appropriation of funds.

**FISCAL/POLICY ALIGNMENT**

This action is consistent with the City’s 2019-2020 Operating Budget City Service Areas Delivery Framework for Performance-Driven Government for Operational Services: community and economic development.

**BUDGET REFERENCE**

The table below identifies the fund and appropriations to fund the contract recommended as part of this memo and remaining project costs, including project delivery, construction, and contingency costs, subject to the appropriation of funds.

Fund #	Appn #	Appn. Name	Total Appn	Amt. for Contract	2019-2020 Adopted Operating Budget Page	Last Budget Action (Date, Ord. No.)
001	3132	Historic Preservation	\$332,987	N/A	IX-15	10/22/2019 Ord. No. 30325

**CEQA**

Exempt, CEQA Guidelines Section 15262. Feasibility and Planning Studies. This is a Master Agreement for consultant services with no binding commitment to a course of action that will result in a physical change to the environment.

/s/

ROSALYNN HUGHEY

Director, Planning, Building & Code Enforcement

For questions, please contact Juliet Arroyo, Historic Preservation Officer, or Page Benway, Senior Analyst, at (408) 535-7887.