



HISTORIC PRESERVATION APPLICATION EXPERT REVIEW PROFESSIONAL SERVICES

REQUEST FOR PROPOSAL (DCA RFP Number 8049.0709b)

The New Jersey Historic Trust (hereinafter Trust) was created by State law in 1967 to provide financial support, protection and technical assistance to historic sites and organizations in New Jersey. The Trust is a public agency affiliated with the State Department of Community Affairs, with offices located at 101 S. Broad Street, 6th Floor, Trenton, NJ 08608 (postal address P.O. Box 457, Trenton, NJ 08625).

The New Jersey Historic Trust is authorized by the Garden State Historic Trust Act of 1999 to provide grants to non-profit organizations and units of municipal and county governments to preserve historic resources in New Jersey. The Trust seeks assistance of outside expert consultants to evaluate applications for grant funds. The Trust will be hiring three (3) consultants to review and score forty nine (49) Historic Site Management proposals and twenty eight (28) Cultural Trust Capital proposals, and attend a two-day evaluators' panel meeting. Please see the attached sample contract for specific terms of professional services.

Response to Request:

Please submit your proposal to the attention of Dorothy P. Guzzo, Executive Director, New Jersey Historic Trust, if interested in entering into a Professional Services Contract Agreement with the Trust per the terms of the attached draft *Professional Services Contract*, and include a profile of your firm with curriculum vitae, and an hourly rate price quote which you will submit to the Trust for hourly services reimbursement in an amount not to exceed \$3,000.00, charged to the Trust's FY 10 operational account as described hereinabove. Also, please read and sign the attached Agency RFP and State of New Jersey General Terms and Conditions (item #2), State of New Jersey Standard Terms and Conditions (item #4), and fill out and sign the following attached forms: Code of Ethics Disclosure (item #5), Source Disclosure (item #7), AA-Supplement (item #8), and Standard RFP Forms (item #9). Return all filled out and signed forms with your proposal.

All proposals are due in the office of the New Jersey Historic Trust, Department of Community Affairs, 101 S. Broad Street 6th Floor, Trenton, NJ 08608, by **4pm on Thursday, July 30, 2009**. All proposals will be date stamped as they are received. The proposals will be opened and read at 10am on Friday, July 31, 2009.

Scope of Services Requested:

The Consultant will perform the following services which will include, but not be limited to:

1. Review, evaluate, and score forty nine (49) Historic Site Management proposals and twenty eight (28) Cultural Trust Capital Preservation applications.
 - a. Review the copies of funding applications which will be mailed to you in August 2009.
 - b. Assess the applications based on the criteria for review established by the Trust Assign each application a preliminary score.
 - c. Review the site reports for each application prepared by Trust staff, which will be mailed to you in September, 2009. Tentatively score the applications using the Trust's application score sheet.
 - d. Attend a two-day evaluators' panel meeting in New Brunswick, NJ, scheduled to be held on November 12 & 13, 2009, bringing your review notes and preliminary scores and providing comment and final scores for each application.
 - e. Be available by phone, if needed, for further decisions or clarification during the Trust's Grants and Loans Committee review of your comments and ranking, on November 23, 2009.
2. Providing verbal and written professional advice on the applications to the Trust's Board members and staff as needed. Assist staff and Trust Board in the assessment of the potential impact of proposed work on the historic resources, the strengths and concerns with the proposal, and provide comment for discussion with the applicants.

Time Frame of Services:

The Consultant's Agreement for professional services will commence upon both parties signing the Agreement and will terminate on January 1, 2010. Please see attached sample contract for contract termination terms.

Compensation for Services:

The Trust will reimburse the consultant for professional services rendered pursuant to performance of this agreement up to a maximum of \$3,000.00. In addition, the Trust will reimburse the consultant for all "out-of-pocket" expenses which include travel, telephone, and overnight hotel accommodation and meals as required for attending and participating in the evaluators' panel session, up to a maximum of \$1,000.00.

Disclosure of Conflicts of Interest:

Please note that Consultants cannot have any connection with the applicant organizations or the applications under review. Attached are the Historic Trust's Code of Ethics and Disclosure Statement and the list of the applicant organizations attached. Please complete the Disclosure Statement verifying that you have no connection to these applicants and return it with you proposal.

Further Information:

Contact Ross Sweetland, Supervising Historic Preservation Specialist of the Historic Trust with any questions concerning the above services. He can be reached by phone at 609/984-0473 or by e-mail at rsweetland@dca.state.nj.us.

Timeline for 2009 Historic Site Management and Cultural Trust Capital Preservation Application Reviews

May 14, 2009

Applications were delivered to the Trust.

August 2009

Copies of applications (provided by applicants) are mailed to evaluators. Reviewer Notebook is also sent to evaluators containing the criteria for review

Summer and Fall, 2009

Trust staff reviews applications and visit applicant sites.
Trust staff writes application summaries.

September, 2009

Staff site reports are mailed to evaluators. Site reports summarize staff visits to each application and strength and weaknesses noted based on criteria for review. With site reports are sent copies of score sheets for initial/draft scoring.

November 12 and 13, 2009

Two-day evaluators' panel meeting is held in New Brunswick, NJ.
During meeting applications are discussed and scores are finalized.

November 23, 2009

Trust's Grants and Loans Committee meets to discuss the evaluators' comments and ranking and make final ranking for full Board.

December 9, 2009

Trust's board meets and ratifies grant recipients for 2008 grant round.