



527 Washington Street, Newton, MA 02458  
TELEPHONE 617-796-1450  
FAX 617-552-7228  
[www.historicnewton.org](http://www.historicnewton.org)

**REQUEST FOR PROPOSALS  
ARCHITECTURAL & ENGINEERING SERVICES  
DURANT-KENRICK HOMESTEAD**

286 Waverly Ave.  
Newton, MA

Proposals Due: December 17, 2009 at 4:00 pm  
Late proposals will be rejected

Deliver Complete Proposals to:  
Cynthia Stone  
Director, Newton History Museum  
Historic Newton  
527 Washington Street  
Newton, MA 02458  
E-mail PDF to: [historicnewtonrfp@gmail.com](mailto:historicnewtonrfp@gmail.com)

Site/Project Walk-Through: Monday, November 23, 2009 at 10:00am  
Notify of attendance: Laura Costello  
Historic Newton  
617-796-1458  
[historicnewtonrfp@gmail.com](mailto:historicnewtonrfp@gmail.com)

Historic Newton / The Newton Historical Society, Inc.  
reserves the right to reject any or all proposals





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November 17, 2009

**1) INTRODUCTION**

- a) The Newton Historical Society, inc. (NHS), a private, not-for-profit 501(c)3 institution, is soliciting proposals for architectural and engineering services to restore the house and grounds of the Durant-Kenrick Homestead, and develop through construction an existing conceptual plan for the construction of a new Education and Orientation Center to be attached to the 1732 home.
- b) The Durant-Kenrick Homestead, located at 286 Waverly Avenue is one of the few pre-Revolutionary houses remaining in the City of Newton. The 3,000 sq. ft. house has been maintained in its Colonial condition and is surrounded by specimen trees planted by its namesake, William Kenrick, a prominent 19<sup>th</sup> century horticulturist. The architectural services described below will enable the NHS to open the house and grounds to the public and school groups for programs ranging from pre-Revolution Newton to horticultural taxonomy.
- c) Work will include: confirming current program, budget and schedule parameters, developing restoration and new construction documentation for NHS design approval and cost estimates, obtaining approvals from the Newton Historic Commission and the City of Newton zoning, coordinating competitive bidding by qualified contractors, and observing construction.
- d) The Durant-Kenrick Homestead Transition Committee (Committee), a sub-committee of the Newton Historical Society, Inc. Board of Directors, shall receive, review and evaluate on a competitive basis all timely proposals. The Committee will make a recommendation to the NHS Board of Directors of a selected consultant for negotiation and award of a contract
- e) Activities and services will commence upon selection of a consultant and the signing of a contract using the Standard AIA Owner/Architect Agreement B-101 (2007).
- f) A site/building walk-through and pre-proposal conference will be held on Monday, November 23, 2009 at 10am at 286 Waverly Ave. in Newton, MA. Please call or email Laura Costello at 617-796-1458/historicnewtonrfp@gmail.com to acknowledge attendance.

- g) Completed proposals are due no later than Thursday, December 17, 2009 at 4:00pm.
- h) Proposals are to include qualifications and fees with the Fee Proposal submitted in a separate sealed envelope marked "Durant-Kenrick Homestead-Fee Proposal".
- i) Historic Newton /The Newton Historical Society, Inc. reserve the right to reject any and all proposals.

## **2) PROJECT DESCRIPTION**

- a) NHS Coordinating Consultants:
  - i) The selected design team will coordinate their services with an Owner's Rep/Clerk of the Works Consultant that will assist the NHS in the development of the design, cost estimating, contractor selection and liaison to the NHS during construction. The Owner's Rep is not selected at this time, but is expected to be engaged prior to the selection of the architect/engineering team.
  - ii) The NHS is currently working with landscape architect Lucinda Brockway of Past Designs on the landscape design and preservation restriction associated with the Durant-Kenrick Homestead grounds. A current conceptual site plan for both parcels has been presented and reviewed by NHS. Approval is pending further development that will occur in this next phase of the project.
  - iii) NHS wishes to continue this relationship with Lucinda Brockway/ Past Designs through the next phase of the project. The selected design team will be asked to include Lucinda Brockway/Past Designs on their team for all site-related and landscape issues.
  - iv) See the attached Appendix G for a preliminary Landscape Architecture Scope of Work to be included. The selected design team will coordinate their services with the Landscape Architecture Scope of Work to insure that all necessary and required Scope between the various disciplines is included in their overall Scope and proposed fee.
  - v) Lucinda Brockway's contact information is:

Lucinda Brockway  
Past Designs  
53 High Street  
Kennebunk, Maine 04043  
207-985-4326  
[cindy@pastdesigns.com](mailto:cindy@pastdesigns.com)

- b) The Durant-Kenrick grounds: The 2 acre lot on which the house sits is the last remaining parcel of what was once the most significant nursery in 19th century New England. It is located at 286 Waverly Ave. Newton, MA and is currently in the process of ownership transition to the Newton Historical Society. (See Appendix A)
- c) The Durant-Kenrick House: The 1732 gambrel structure has been maintained in good condition and is listed on the National Register of Historic Places. In preparation for the

upcoming restoration work, the NHS has commissioned several reports on the building which will guide the architect and NHS in restoration decisions. A structural report has been performed by a licensed engineer (See Appendix C), an analysis of interior finishes has been conducted by an architectural historian (See Appendix D) and, building code and zoning analyses (See Appendix E & F) have also been performed to further frame discussion.

- d) The Education and Orientation Center: The new two-story, 1250 sq.ft. wing will house a new entry, admissions hall, accessible restrooms, elevator, and classroom space on the ground floor with administration and storage space on the 2nd floor. Circulation between the historic home and the new building will connect on both the 1st and 2nd floors. The new Education and Orientation Center structure shall be designed to meet all applicable codes and designed, if not certified, to meet applicable USGBC / LEED standards.
- e) A conceptual site design & plan was developed by McGinley Kalsow & Associates in 2006 and shall form the basis of design (See Appendix B). The plan calls for the removal of the late 19<sup>th</sup> century ell at the rear of the historic house and in its place, the new Education and Orientation Center to be constructed. A late-addition 2nd floor bath will also be removed to improve circulation to a small research library that will inhabit a reprogrammed and renovated bedroom in the NE corner of the house. Finally, a new porch on the East side of the home will begin the visitor entry sequence and connect the existing building to the new Education Center.

### **3) PROJECT FUNDING & BUDGET**

- a) Funding of the project will be provided by the Newton Historical Society, Inc. and funds are committed.
- b) The Newton Historical Society, Inc. has established a preliminary budget range for the construction cost only of the project: \$1, 500, 000- \$1,750,000. Other associated project costs are budgeted separately. The NHS does not represent that this budget is sufficient for completion of the project as described below in the Project Description, but is provided to guide the applicants in the preparation of their proposals.

### **4) REVIEW OF PROPOSAL DOCUMENTS**

- a) Request for Proposal Documents may be obtained by calling or e-mailing Laura Costello at 617-796-1458 / [historicnewtonrfp@gmail.com](mailto:historicnewtonrfp@gmail.com).
- b) All applicants should carefully review and examine the Request for Proposal documents and all attached appendices prior to submitting a proposal. Should an applicant find discrepancies, ambiguities, or omissions in the Request for Proposal documents they shall submit questions in writing to Laura Costello at [historicnewtonrfp@gmail.com](mailto:historicnewtonrfp@gmail.com) no later than Tuesday, December 1, 2009 by 5:00pm.
- c) The NHS will send written addenda to all applicants in response to all submitted reasonable questions by Thursday, December 10, 2009.
- d) Prior to submitting a proposal, each applicant shall examine and familiarize themselves with the existing conditions including applicable laws, codes, ordinances, rules and

regulations that will affect his or her work, including all documents provided in the Appendices. Applicants should ask the NHS for any additional information deemed necessary for them to be fully informed as to what is to be expected prior to submitting a proposal.

## 5) SCOPE OF SERVICES

Scope of Services and Responsibilities to be defined as per Standard AIA Owner/Architect Agreement B-101(2007), including but not limited to the following:

- a) **Design Team Consultants:** Architect is to confirm and retain consultants as needed to execute the Scope of Services.
- b) **NHS Collaborating Consultants:** Architect is to review and confirm their understanding of the Scope of Services provided by Lucinda Brockway/Past Designs, Landscape Architect and the Owner's Rep/Clerk of the Works. All Scope of Services described below will include necessary coordination with the design of site and grounds provided by Lucinda Brockway/Past Designs and input provided by the Owner's Rep/Clerk of the Works.
- c) **Pre-Design:** Architect is to review current Project Description relative to existing NHS construction budget and updated cost estimate and advise NHS Committee as to the potential conflicts between scope and budget.
- d) **Schematic Design:** Work with the NHS Committee to refine and develop the existing 2006 conceptual design to arrive at an approved schematic design. This phase will include defining appropriate restoration/preservation scope, architectural plans, primary sections, elevations, schematic description of all needed MEP/FP engineering systems and schematic specifications for cost estimation, pricing review and approval by NHS Committee.
- e) **Approvals:** Prepare and present appropriate materials to obtain timely approvals, including variants, from relevant regulating bodies including the Newton Historic Commission Review, the Preservation Restrictions Board and/or the Architectural Barriers Access Board.
- f) **Design Development:** Develop the design in drawings and outline specifications that meet with NHS Committee approval for the purpose of identifying and clarifying all required restoration/preservation, architectural and MEP/FP design-related aspects of the project. Provide a cost estimate of the Design Development Drawings and Specifications for review and approval by the NHS Committee. Coordination with site and grounds Design Development provided by Lucinda Brockway/Past Designs is to be included in this phase.
- g) **Construction/Permit Documents:** Produce a final and complete set of drawings and specifications for the construction of the Education and Orientation Center and the restoration of the Durant-Kenrick house. Drawings shall include, but are not limited to architectural, structural, mechanical, electrical, and fire protection system design. Coordination with site and grounds Design Development provided by Lucinda Brockway/Past Designs is to be included in this phase.

- h) **Bidding & Contractor Selection:** Distribute Construction/Permit Documents to pre-qualified General Contractors for the purpose of soliciting competitive bidding for construction of the project. Manage the bidding process, answer questions from competing General Contractors and advise and assist the NHS Committee in the review and evaluation of submitted bids.
- i) **Value Engineering/Scope Adjustment:** If needed at the completion of the Bidding, the design team is to assist the NHS Committee in the identification of appropriate potential cost savings and/or value engineering options for the purpose of meeting budgetary constraints.
- j) **Construction Administration:** Conduct bi-weekly site visits throughout construction for the purpose of providing clarifications and answers to construction document questions. Verify compliance with construction documents, as well as perform field reports, review & approve requisitions, punch list administration, and project closeout.
- k) **Rehabilitation Standards:** Design and renovation work in the Durant-Kenrick Homestead shall comply in detail and in spirit with the Standards for Rehabilitation as described by the United States Secretary of the Interior's Standards for the Treatment of Historic Properties and codified in 36 C.F.R. Part 68.
- l) **Green Standards:** Design project and specifications to meet applicable LEED standards. Research and assist the NHS in applying for any tax advantages, vouchers or grants that may be applicable. **In Proposal, please include a separate add/ alt fee for obtaining LEED Certification.**

## 6) PRE-QUALIFICATIONS

- a) To be considered as eligible to submit a proposal, applicants must be legally licensed under applicable laws in the State of Massachusetts.
- b) Applicants must have demonstrated prior experience in the restoration of early American homes as well as the design and completion of small institutional projects, with a history of bringing projects to completion on time and budget.

## 7) PROPOSED RFP and PROJECT SCHEDULE

- |   |                              |
|---|------------------------------|
| a) Walk-Through/Pre-Proposal Conference:      | November 23, 2009 at 10:00am |
| b) Proposal Questions Submitted:              | December 1, 2009 by 5:00pm   |
| c) Questions Answered                         | December 10, 2009            |
| d) Proposals Due:                             | December 17, 2009 at 4:00pm  |
| e) Interviews                                 | January 4-8, 2009            |
| f) Architect Selection:                       | January 14, 2009             |
| g) Execution of AIA Contract                  | January 28, 2009             |
| h) Schematic Design – Construction Documents: | February, 2010 – July, 2010  |
| i) Contractor Selection:                      | September 1, 2010            |
| j) Construction Begins:                       | October 1, 2010              |
| k) Occupation Target Date:                    | October 1, 2011              |

## 8) PROPOSAL FORMAT

Please include all of the following on 8 ½" x 11" sheets in this order:

- a) Cover letter demonstrating your interest, understanding, and qualifications for the project.
- b) Current resumes of architectural team including design principal and key staff.
- c) Proposed consultant resumes.
- d) Proof of licensure.
- e) Statement of insurance & coverage limits.
- f) Philosophy of restoration/historic preservation/renovation: Please submit a short description of your approach to the restoration of historic buildings and the balance between preservation, contemporary technologies and cost, particularly as it pertains to the integration with new construction.
- g) Description of how the Applicant would explore, propose and implement green energy systems and finishes into the project without compromising the historic fabric of the 1732 historic homestead.
- h) Proposed Add/Alt Fee for obtaining LEED Certification on Education & Orientation Center.
- i) Client References: Please list three owner/client references we may contact. Include name, physical address, e-mail address, phone number, short description of the project including budget and square footage.
- j) Relevant Work samples: Applicants should submit no fewer than 5 similar and/or relevant work samples including images, written description, and total project cost.
- k) Any other information deemed relevant to the project, and which the Applicant believes will further the competitiveness of the proposal.

## **9) FEE**

- a) The Applicant must submit a lump sum Fee for the completion of the project as outlined in the Project Description and Scope of Services.
- b) The Fee shall include the services of all necessary consultants required for completion of the in Project as outlined in the Project Description and Scope of Services.
- c) The Fee shall itemize anticipated costs associated with reimbursable expenses such as copying, mileage, photographs, printing, etc.
- d) The Fee shall be provided using the separate FEE PROPOSAL FORM attached as Appendix H, included in the submitted package but sealed in a separate envelope.

## **10) PREPARATION OF PROPOSALS & SPECIFICS**



- a) Proposals Due Date: December 17, 2009 by 4:00 p.m. Proposals received after this time will not be accepted.
- b) Envelopes containing proposals are to be submitted in hard-copy form and labeled as following:
  - Name and Address of Project: Durant-Kenrick Homestead Project
  - Name and Address of Applicant: \_\_\_\_\_
- c) Provide 8 copies of the Proposal and 1 copy of the Fee Proposal mailed or hand-delivered to the following address:
  - Cindy Stone, Director
  - Historic Newton
  - 527 Washington Street
  - Newton, MA 02458
- d) E-mail a PDF version to: [historicnewtonrfp@gmail.com](mailto:historicnewtonrfp@gmail.com)

## 11) EVALUATION

The selection process will be conducted by the NHS Committee and will include an evaluation procedure based on the criteria identified below:

- a) Depth of experience with similar projects, particularly integrating colonial buildings with new construction.
- b) Professional qualifications of the design team and the ability to balance technical expertise and appropriate aesthetic sensibility related to historic preservation and construction.
- c) Desirability of the indicated approach to the project and demonstrated understanding of the goals of the project.
- d) Excellence of communication skills and a demonstrated ability to work collaboratively and productively with small boards, institutional clients and public approval agencies.
- e) Strength and credibility of client references.
- f) Depth of experience and demonstrated success of bringing projects to completion on time and budget.

## 12) INTERVIEW

- a) The NHS Committee will be conducting interviews with selected Applicants during the week of January 4-8, 2010.

## 13) ADDITIONAL RESOURCES

- a) Appendices:
  - A. Site plan - Verne Porter, Land Surveyor
  - B. 1<sup>st</sup> floor plan, 2<sup>nd</sup> floor plan & Elevation - McGinley Kalsow & Associates

- C. Structural Evaluation Report - M. Wathne
- D. Architectural Evaluation Report - Anne Grady
- E. Building Code Analysis - McGinley Kalsow & Associates
- F. Zoning Analysis - McGinley Kalsow & Associates
- G. Description of Landscape Scope
- H. Fee Proposal Form