



HISTORIC PRESERVATION PLAN RFP

Town of Davidson, NC

November 3, 2020

I. GENERAL BACKGROUND

The Town of Davidson is a village of approximately 13,000 (2018) residents and home to Davidson College, one of the nation's top liberal arts colleges. The town is located 20 miles north of Charlotte along Interstate 77, bordered on the west by Lake Norman and on the east by rural farms and residential areas.

Born of the need to provide support services to students and those who worked at Davidson College, the Town of Davidson now finds itself in a different place. Once small and rural, the town is now wholly within the fast-growing Charlotte metropolitan region. Like other rapidly-growing communities in North Carolina, there is concern that growth pressures threaten the historic fabric of the town. Accordingly, the town's ordinances require that all new development should be context sensitive, using the historic village-centric model – *We must preserve and enhance Davidson's unique, historic downtown and neighborhoods (Davidson Planning Principles)*. Additionally, the threat of demolition of historic structures both within and outside locally designated historic districts is a real concern threatening what the town believes to be as its most fundamental core – the preservation of small-town character. Creating the town's first Historic Preservation Plan will solidify the town's historic preservation commitment and vision for years to come with actionable tools to make meaningful and thoughtful decisions about preserving Davidson.

Historic preservation has long been a priority of the Town of Davidson. Originally established in 1989, the Davidson Historic Preservation Commission (HPC) has operated continually for the past 31 years. The HPC oversees the town's local historic district, first adopted in 1989. A larger National Register District designation followed in 2009. In 2020, the town expanded the existing local historic district to include the North Main Extension. Field survey work has already been completed for future expansions of the local district. Additionally, the HPC

works in partnership with the Charlotte-Mecklenburg Historic Landmarks Commission to recommend properties for landmark designation; Davidson currently has 25 designated historic landmark properties. In 2018, Davidson further reiterated a commitment to historic preservation with a Certified Local Government (CLG) designation.

Historic preservation goals were reinforced with the adoption of the Davidson Comprehensive Plan in early 2020. Specifically, “Davidson will celebrate its unique architectural and cultural history through preservation initiatives and designing new buildings, spaces, and landscapes that complement the existing historic fabric and leave an inspiring legacy.” Development of a historic preservation plan is included as an action item; this plan will be critical to a successful historic preservation plan for the town.

More recently, the Davidson Board of Commissioners adopted the 2020-2021 Strategic Plan that includes historic preservation as a guiding tenet: *The Town of Davidson will preserve our historic properties that contribute to our vibrant and unique community and honor the history of the lived experiences of our residents.* Specific action items include developing a historic preservation plan, continuing to expand the local historic district, revising historic district design guidelines, developing a strategy for naturally occurring affordable housing that aligns with historic preservation goals, and using available grants to help commercial property owners to rehabilitate historic properties.

Town staff views a historic preservation plan as a direct result of the community-input driven Comprehensive Plan and the 2020-2021 Strategic Plan. The town realizes that fundamental building blocks exist (local historic district, landmarks, National Register district, and commitment) but lacks the mechanism to weave these integral components together within the larger community planning process. More specifically, the town aims to educate and involve more residents in Davidson’s historic preservation efforts. This includes traditionally underrepresented communities such as the town’s historically African-American West Davidson community. Increasing designation efforts, working with trusted partners, developing updated guidelines, and solidifying a lasting commitment to historic preservation are all expected outcomes of the plan. In short, the historic preservation plan will be Davidson’s roadmap to developing an overall strategy and vision for historic preservation in town.

Further, Davidson aims to continue building a constituency that supports historic preservation as a civic virtue vital to community development, economic vitality, and quality of life. Further documenting and identifying local historic resources so that they become better known and understood with respect to community planning creates an enhanced intersection between historic preservation and larger town goals. This historic preservation plan will direct preservation efforts in town over the next 10-15 years. It will provide guidance to better incorporate historic preservation goals into the overall planning process, outline tools and

strategies for improving the quality of preservation efforts, and demonstrate the importance of historic preservation to citizens and community leaders in a strategic and comprehensive manner.

II. PROJECT DESCRIPTION

The Town of Davidson seeks proposals from qualified consultants to draft and facilitate public participation in the development of a town-wide historic preservation plan. The historic preservation plan will serve as a guide for proactive preservation decision-making over the next 10-15 years. The plan will synthesize the town's existing preservation efforts and the desires expressed by the community during the planning process, and recommend actions for integrating historic preservation into town policies and regulatory activities. The scope of this plan includes the town's entire planning area (i.e. Davidson's corporate limits and extraterritorial jurisdiction).

III. SCOPE OF WORK

The scope of work is intended to guide the consultant, but also allow for flexibility in terms of the project approach. The Town of Davidson welcomes innovation and creativity from the consultant on any of the following tasks:

A. Data Collection and Analysis

The consultant will document Davidson's existing historic preservation approach, review updated National Register Historic District survey information, contributing structures, designated landmarks, and existing plans and policies. The majority of this work must be completed prior to any public engagement initiatives/meeting(s).

B. Public Involvement

Phase 1: Introductory Meetings

Following introductory meetings with the historic preservation commission (HPC), planning board, elected officials, and town staff to identify major issues and concerns, the consultant will present the project schedule, process, goals and objectives in a public meeting. If recommended, formation of a historic preservation plan committee comprised of citizens/stakeholders may occur during this time. The committee may be comprised of representatives from key groups including, but not limited to the board of commissioners, historic preservation commission, planning board, Davidson Historical Society, Davidson College, and the Charlotte-Mecklenburg Landmarks Commission.

Phase 2: Public Engagement Initiatives

The consultant will facilitate preparatory stakeholder interviews to review stakeholder, property owner, neighbor, and citizen concerns, identifying plan opportunities and constraints. Additionally, the consultant will lead multiple public engagement initiatives. While the actual format of the public engagement/meetings will be determined jointly by the consultant and town staff, they will be highly interactive and allow the community a variety of opportunities for input.

Phase 3: Plan Composition, Draft Plan Presentation/Revisions

The consultant will prepare and distribute a draft plan to the project manager for review by staff and/or the historic preservation plan subcommittee (depending on the approach used). The historic preservation plan subject matter may include the following:

- A. Description of benefits of historic preservation
- B. History of and legal basis for historic preservation efforts
- C. Analysis of historic properties and assets using recently updated National Register Historic District survey information
- D. Explanation and diagnosis of existing preservation approach
- E. Trends affecting historic preservation properties
- F. Historic preservation goals and policies
- G. Linkages between historic preservation goals/policies and other community goals/policies, including reconciling any conflicts (i.e. naturally occurring affordable housing, gentrification, etc.)
- H. Strategies for improving education and outreach for historic preservation
- I. Historic preservation action plan and implementation schedule
- J. List of preservation resources and partner organizations

A consolidated set of comments will be provided and revisions will be made by the consultant. Depending on the quality of the initial/subsequent drafts, this process may occur twice (or more as needed, within reason). The consultant project manager and/or town project manager will present the draft plan to the historic preservation commission and the planning board in a joint public meeting. After review and comment by the historic preservation commission and planning board, the plan will be presented publicly to the board of commissioners and citizens. The draft plan will be amended and the final plan, with its accompanying regulatory language, will be incorporated into a final report.

Phase 4: Plan Adoption*

The historic preservation commission will review the proposed final plan and make a formal recommendation. The planning board will then review the final plan and give their recommendation. The board of commissioners will discuss the proposed final plan, historic preservation commission recommendation, and planning board recommendation

in a public meeting format. The board of commissioners may hold a public hearing and then take action on the proposed plan.

**This phase, including revisions, can likely be completed without consultant assistance.*

IV. PROJECT BUDGET

The budget planned for this project is \$60,000. Funding will be assigned to the FY2020-2021 budget. Some firms now include or identify reserve funds within the allocated budget for use towards extra/unforeseen meetings that may arise throughout the process. Please factor this into the submittal contingency funds to be used for meetings, potential speakers, extra field work, ancillary documentation, etc.

V. PROJECT SCHEDULE

Ideally, the project will commence one month after signing a contract and be completed within a nine- to twelve- month period, with adoption by the board of commissioners targeted for winter/spring 2022.

VI. PROJECT MANAGEMENT AND ORGANIZATION

The staff coordinator for the project will be Lindsay Laird, Planner. Town staff will assist the consultant with coordination of meetings. The consultant will prepare a work plan including a refined scope of work, timeline, and budget.

VII. PROPOSAL SUBMITTAL

Respondents should submit a written proposal that includes:

- A. **Firm Profile:** A brief history of the firm and relevant details.
- B. **Team:** Identification of the individual or individuals in the firm/firms who will work on the project. This information should include a list of each person's relevant experience and/or qualifications.
- C. **Experience/Examples:** Examples of previous work and relevancy to this project. This should include official references for the town's consideration.
- D. **Services Offered:** A description of the range of services and list of products or deliverables to be provided. This should include a description of what work will be performed directly by the lead consultant and what work will be performed by sub-consultants or affiliated team members (if any).
- E. **Work Scope:** A scope of work to complete the project based on this RFP.

- F. **Budget/Costs:** Costs for the project, including hourly rates and a not-to-exceed total budget. The proposal should include alternative line-items based on the alterations/reductions in scope:
- G. **Schedule:** A schedule for the project, in month-long increments, including deadlines for completion of each Phase, dates for public outreach initiatives, and deadlines for draft plans and presentations.

The proposal shall include five hard copies and one digital copy. Send proposals to:

Jason Burdette, Planning Director
216 South Main Street
PO Box 579
Davidson, NC, 28036
jburdette@townofdavidson.org

The proposal must be received no later than 4:00 p.m. Friday, November 20, 2020. Questions should be directed to Lindsay Laird, Planner, via email: llaird@townofdavidson.org.

VIII. SELECTION CRITERIA

Below is a list of attributes the Town of Davidson envisions considering in consultant selection:

- A. Qualifications and experience in creating historic preservation plans;
- B. Detailed proposal of services and specific costs for each phase;
- C. Ability of consultant to meet expected project completion schedule;
- D. Ability to understand existing conditions/local context, including facilitation experience with highly-engaged citizens in a changing community;

IX. MISCELLANEOUS

The Town of Davidson reserves the right to accept or reject any and all proposals submitted. Notwithstanding anything to the contrary in this document or in any addendums to this document, unless the contrary provision refers specifically to this provision, the Town of Davidson reserves the right to negotiate changes of any nature with any applicant with respect to any term, condition, or provision in this document and/or in any proposals, whether or not something is stated to be mandatory and whether or not it is said that a proposal will be rejected if certain information or documentation is not submitted with it.

X. RESOURCES

- A. [Comprehensive Plan](#)
- B. [Board of Commissioner Strategic Plan 2020-2021](#)
- C. [Planning Ordinance](#) (see Section 2, Planning Areas and Section 22, Historic Preservation Ordinance):
- D. [Historic Preservation Webpage](#)
- E. [Davidson Local Historic District Design Guidelines](#)