

**TOWNSHIP OF LOWER MERION**  
***Building & Planning Committee***  
**Issue Briefing**

**Topic:** Consultant Recommendation to Prepare a Design Guidelines Manual

**Prepared By:** Christopher Leswing, Director Building and Planning Department.

**Date:** December 5, 2017

**I. Action To Be Considered By The Board:**

Consider for recommendation to the Board of Commissioners award of a contract for professional historic preservation services to Frens & Frens, LLC for the creation of a design guidelines document for the historic districts and historic resources of Lower Merion Township.

**II. Why This Issue Requires Board Consideration:**

The Building & Planning Department issued a Request for Proposals (RFP) from qualified firms to create a Design Guidelines manual. While half of the fees will be paid for by a Certified Local Government (CLG) grant from the Pennsylvania Historical and Museum Commission (PHMC), a contract award of this nature requires Board of Commissioners approval.

**III. Current Policy Or Practice (If Applicable):**

In the late 1990s, the Township's Historical Architectural Review Board (HARB) commissioned a series of Design Guideline documents for the use of historic preservation project applicants and homeowners. These guideline packets have been in use for nearly 20 years, and since that time the Township has recognized several new historic districts and enacted the Historic Resource Overlay District into the code, which protects properties outside of historic districts. Though still useful in many ways, the 1990s-era Design Guidelines have not been used as consistently in recent years and require updating. A rethinking of the Design Guidelines with a broader scope, using examples from recently designated districts, and the availability of an easy to use digital version accessible on the Township's website are needed. Ardmore Storefront Design Guidelines were adopted in 2006, but no up-to-date guidelines for residential districts or for areas outside historic districts are currently available.

Recommendation LH6.d of the 2016 Comprehensive Plan is to "improve the overall approval process for individual historic properties and historic districts by providing clearly written and illustrated design guidelines." In addition, the updated CLG guidelines from PHMC (currently in draft form) are expected to require that participating Certified Local Governments "must have adopted design guidelines that illustrate how the review standards and criteria in the ordinance should be applied to designated properties..." If the Township wishes to remain a CLG and take advantage of the benefits that status makes available, including potential future grants, up-to-date Design Guidelines must be adopted and made available to Lower Merion residents.

#### IV. Other Relevant Background Information:

The RFP was advertised locally and was also sent out to historic preservation firms which have done work in the Township and region. The Township received four (4) proposals from consultants and teams of consultants. Proposals were received from Preservation Design Partnership (PDP), Frens & Frens, sbk + partners, and Hickey Architects. The overall quality of the consultant proposals was high and each of the consultant teams provided a creative and professional approach to the scope of the RFP, but each differed in aspects such as professional rates and expertise with design guidelines. Applicants also had varying degrees of experience and familiarity with Lower Merion's code and historic resources.

A five (5) member Selection Committee comprised of Planning Division staff was responsible for evaluating the four proposals and making a recommendation for the appointment of a qualified consultant. The Selection Committee reviewed and scored the proposals independently then jointly discussed their evaluations and selected the finalist to be presented to the Board of Commissioners for their review and consideration.

Four (4) firms submitted proposals. The Selection Committee reviewed each firm's past work in historic preservation and Design Guidelines. Of the 4 proposals, Hickey Architects received the lowest score based on their lack of familiarity with the Township and their lack of experience with preparing design guidelines. Hickey Associates also did not provide a sufficient cost proposal.

The three remaining proposals were very close in cost, but the selection committee identified a wide disparity in professional qualifications and proposed work. The Selection Committee determined that Frens & Frens, LLC had the strongest proposal based upon their familiarity with the Township and their approach to delivering a dynamic product that can be effectively utilized by the Township. While sbk + partner's cost proposal was slightly less than Frens & Frens, LLC, the Committee did not feel that the minor cost difference offset the significant difference in proposal content and professional qualifications between the firms.

For these reasons, and the high quality of the firm's Design Guidelines for other communities, **the scores of the members of the Selection Committee unanimously found that Frens & Frens' proposal provided the best value based on their expertise and the overall quality of their Design Guidelines for other communities.**

Firm	Average Score	Proposed Cost
Frens & Frens, LLC	90.6	\$36,000
Preservation Design Partnership, LLC	84.2	\$36,000
sbk + partners	67.8	\$35,260
Hickey Architects	43.4	Unspecified

The project would be led by Dale Frens, AIA, and Carol Quigley, who have both served as consultants assisting the Township's HARB and Historical Commission since 2015. In addition to their regular work for these review boards, Frens and Quigley have assisted Planning Staff periodically with reviews of new construction projects. Their extensive experience with architecture, especially involving historic buildings and older neighborhoods, has been invaluable in the Township's review of new construction that is

designed to complement historic areas. This kind of consultation is similar to the kind of advice that would be provided in Design Guidelines, though the Guidelines' intended audience would be historic property owners, architects, and others submitting applications to the historic review boards. Planning Staff has been impressed by the quality and comprehensiveness of the advice provided by Frens & Frens when it has been requested of them, and believe this level of clearly written advice would work well for the intended audience of the Design Guidelines.

#### **V. Impact On Township Finances:**

In the 2018 proposed Township budget, Historic Preservation consulting services are budgeted for \$30,000, which includes consulting work for the HARB and Historical Commission. The total project cost is \$36,000, half of which comes from the grant and half must be matched by the Township. Staff has identified the following funding structure for providing the match. Staff notes that the anticipated allocations from the 2017 and 2018 Historic Consultant budget result from the increased role of the Township's Historic Preservation Planner in supplementing consultant services. The Design Guidelines project will further assist the Historic Preservation Planner in reducing the need for outside consultant service in coming years. In the long term, as applicants are directed to follow the Design Guidelines, staff and billable consultant time reviewing and advising on proposals for work in the historic districts and involving historic resources is expected to be reduced substantially.

<b>Project Funding</b>	
<b>Project Cost</b>	<b>\$36,000</b>
PHMC Grant Amount	\$18,000
Township Match (Cash)	\$18,000
<b>Township Match Breakdown</b>	
Anticipated Unused 2017	
Historic Consultant Allocation	\$4,000
Anticipated Unused 2018	
Historic Consultant Allocation	\$7,000
2018 Budget Request	\$7,000
Total	\$18,000

#### **VI. Staff Recommendation:**

Staff recommends the Design Guidelines contract with Frens & Frens be approved at the December 20, 2017 Board of Commissioners meeting and allocating \$7,000 towards the preparation of Historic Design Guidelines in the 2018 budget.