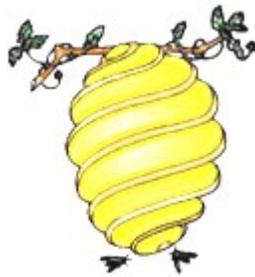


REQUEST FOR PROPOSAL (RFP)
For
ACQUISITION, PRESERVATION and ADAPTIVE REUSE
Of The
HISTORIC PHILLIPS HOUSE, MORRIS BARN AND PROPERTY
MATTHEWS, NC



Mecklenburg County Historical Landmarks Commission

March 14, 2017

AFM Representative for RFQ: peter.wasmer@mecklenburgcountync.gov

Mandatory site meeting and Inquiries and Questions Deadline

2:00 PM, March 23, 2017

Submittal Due Date:

2:00 PM, April 15, 2017

Submittal Location:

Mecklenburg County Asset and Facility Management (AFM)

Valerie C. Woodard Center, 3205 Freedom Dr., Suite 101,

Charlotte, NC 28208

**NOTE: UPON REQUEST THIS INFORMATION IS AVAILABLE IN AN ALTERNATIVE FORMAT FOR
PERSONS WITH DISABILITIES**

1.0 HISTORIC LANDMARK COMISSION GOALS AND VISION FOR PROPERTY:

The Charlotte Mecklenburg Historic Landmarks Commission (HLC) is offering the Historic Phillips House, Morris Barn and Property for acquisition, preservation and adaptive reuse. The property is located 131 West Charles Street, Matthews NC. The economic incentives provided by local historic landmark designation and potentially the National Register of Historic Places can assist a private investor in restoration of the property in accordance with the design guidelines instituted by the HLC and the Secretary of Interior.

The HLC wants the preservation of the Historic Phillips House and Property to enhance the neighborhood, Town of Matthews and make the general public more aware of the historic significance of the site.

Prospective buyers are advised to consult with officials of the Town of Matthews to determine whether the intended design and use of the property meets the zoning requirements of the Town of Matthews. The property will have to be rezoned for all uses other than existing zoning, which is single family residential.

2.0 PROPERTY DESCRIPTION:

The property known as the Phillips House and Morris Barn is located at 131 West Charles Street, Matthews, North Carolina on a relatively level one-acre lot, located near the historical center of the town of Matthews. The lot is bounded by North Freemont Street, East Charles Street and Library Lane and is located in a block that contains both single-family residential property and commercial properties that face North Trade Street. The Phillips House shares the block with the 1890 Queen Anne-Style Nancy Reid House. Across North Fremont Street is the substantial Queen Anne/Colonial Revival-style 1904 Benjamin DeWitt Funderburk House. To the north of the Phillips House, across East Charles Street runs the rail line of the former Carolina Central Railroad, now CSX. The Phillips House was built in 1925 for O. L. "Pete" Phillips, his wife Beulah Paxton Phillips, and their two daughters Margaret and Mary Louise, in the heart of the town of Matthews, North Carolina. The family moved into the house in February of 1925. The Phillips House was built on the site of the Morris House, a three-room house that was moved to the southeast corner of the one-acre property and used to house servants and farm hands. The Morris House was demolished around 1965. The Morris's gabled barn was left in place and served as barn and a cotton house for the Phillips family. For more information, please visit <http://www.cmhpf.org/surveys&rPhillips.htm>

3.0 SELECTION PROCESS/PROCEDURE

Pursuant to The HLC's desires to select a qualified buyer to acquire the property mentioned above, the process below will be used to make a selection by the HLC and proceed into negotiations for the purchase of the property. The selection process will be as follows:

3.1 Advertisement

A Request for Proposal (RFP) will be advertised in the Charlotte Post, IPS and Preservation NC.

3.2 Notification of Interest/Addenda

A buyer requesting the RFP will be included on the Notification of Interest List and will receive any addenda/clarifications.

3.3 Inquiries/Questions

Questions regarding this project must be directed via e-mail to the AFM representative for this RFP prior to the Inquires and Questions Deadline date and time shown on the cover sheet of this RFP. To ensure fair consideration for all buyers and to maintain equal access to information, prospective buyers shall not contact anyone other than the project manager prior to the award decision. Any attempts to contact other County or HLC representatives may result in disqualification. Any changes or additions to the RFP information will be emailed to each buyer who is on the Notification of Interest List. Oral answers will not be authoritative.

3.4 Selection Process

A. **Selection without Interviews**

The Proposals will be evaluated based on the criteria identified in Section 4.0. Selections may be based solely on the Proposals and references.

B. **Selection with Interviews**

The Proposals will be evaluated based on the criteria identified in Section 4.0.

(If the HLC decides to conduct interviews, buyers will be selected to interview based on their Proposal and references. The buyers being interviewed will have the opportunity to detail their qualifications, approach to the project, and their ability/expertise to complete the rehabilitation required for this project based on prior experience. Interview presentations will be limited to personnel who are slated to be directly and in continuous contact with the HLC Staff for this project. Final selection will be based on the Proposal, references and the interview.)

C. **Notification**

A preferred buyer and one or more alternates will be selected and notified of their status at the completion of the selection process.

D. **Mecklenburg County Landmarks Commission Approval and Contract Execution**

AFM and HLC Staff will request the HLC's authorization to negotiate and execute a contract with the preferred buyer. If after discussion and negotiation, the parties do not agree on a mutually acceptable contract, AFM and HLC Staff will terminate negotiations with the selected buyer, and at its sole discretion, enter into negotiations with the alternate buyer. The HLC reserves the right to withhold the sale for any reason, elect not to proceed with any of the respondents, modify the scope of the work, or re-solicit RFPs.

4.0 **SELECTION CRITERIA**

The HLC will authorize the HLC Selection Committee (made up of AFM, HLC Staff and Commissioners) to evaluate all proposals. The ultimate selection of a buyer is the sole discretion of the HLC and the HLC Selection Committee.

The evaluation process and rankings will be accomplished using the following criteria:

- Proposal completeness and thoroughness – Evaluation of responses to the Submittal Requirements - section 5.0 this document.
- Consistency with public policy - The extent to which the proposed development addresses the RFP guidelines of Historic Preservation.
- Risk factor - The degree to which the proposed development is realistic and capable of being implemented immediately.
- Feasibility and financing - The extent to which market and financial feasibility is proven, and the strength of assurances that debt and equity financing proposals are realistic and assured.
- Property acquisition - The reasonableness of the specific monetary proposal to acquire the property and structures being offered.

5.0 **SUBMITTAL REQUIREMENTS**

Each proposal should respond to all requirements below. Prospective buyers shall submit *1 paper copy and 1 DVD* of their proposal. Proposals must be printed on 8.5x11 recycled paper, printed front and back, bound with one staple in top left corner. (No flash drives, three-ring notebooks, spiral bindings, plastic covers, cover sheet, dividers, cover letters or any other materials will be accepted.) Paper copy(s) and DVD(s) shall be placed in an envelope and labeled with the property name. Proposals shall rigorously follow the requested format and sequence; non-compliance with the format requirements may result in disqualification. Proposals shall be organized in the following manner:

5.1 **Development Program**

A clearly illustrated development program should include square footages of anticipated additions and/or new buildings and identify the locations of program elements. Parking, open space, and amenities should be noted and have type and locations identified. Any proposed civic or cultural uses

should be specifically defined and described.

5.2 Development Plan

Proposals should include a development plan illustrating the anticipated development of the property. Rezoning per this document will be provided by the buyer after the sale. The plan should emphasize building additions (if any) and new buildings that would be constructed along with plans for and future improvements to the site, pedestrian and vehicular ingress and egress points, relationships to the potential transit lines, parking, open space areas and site amenities. Graphic sketches or computer renderings may be helpful.

5.3 Phasing Plan and Schedule

If the restoration/development is to be constructed in phases, there should be a clear indication of which facilities are included in each phase with emphasis on the first phase. The approximate timing and sequencing for each development phase should be indicated, and whether the phasing is sequential or overlapping. When certain assumptions are made regarding local and national economic conditions, market strength, and success with having the property listed on the Local Landmarks and National Register of Historic Places, qualifying statements may be helpful.

5.4 Expectations and requirements of HLC and other enforcement organizations

The extent to which the implementation of proposal concepts is contingent upon commitments or behavior of others should be described. Specifically, the buyer's anticipated requirements or desire for participation by The Historic Landmarks Commission or any other entity should be clearly articulated.

5.5 Property Sustainability

Provide a maintenance program which will assure that the property will be preserved in perpetuity. Provide a program for interpreting the history of the site, e.g. interpretive signage, etc.

5.6 Development Feasibility

Detailed feasibility studies are not required, but the developer should indicate market support and pricing/quality levels for specific uses. Financial feasibility should also be addressed. When certain assumptions are made regarding local and national economic conditions, market strength, and success with having the property listed on the Local Landmarks and National Register of Historic Places, qualifying statements may be helpful.

5.7 Expectations and requirements of HLC and other code and enforcement officials

The extent to which the implementation of proposal concepts is contingent upon commitments or behavior of others should be described. Specifically, the buyer's anticipated requirements or desire for participation by The Historic Landmarks Commission or any other entity should be clearly articulated.

5.8 Buyer Expertise

Buyer(s) need to be identified. The roles of all key leaders in the development process need to be explained. The desire is to understand the individuals and/or corporate entities that will support them in instances of difficulty or default and to assure that they have expertise in historic preservation adaptive reuse projects. If the buyer is not an individual but a company, the proposal must furnish a "Certificate of Authority" signed by the Chief Executive Officer or managing partner of the company that is responding. The certificate must list the specific officers who are authorized to execute agreements on behalf of the company, and should also designate a corporate official to function as "point person" for follow up.

5.9 Financing

Binding financial proposals are required. Developers should describe debt and equity partners, their financial strength and capability, and provide specifics as to their willingness/abilities to finance development elements. Respondents should fully quantify and demonstrate their financial capability to acquire and redevelop this property.

6.0 GENERAL INFORMATION

6.1 Acceptance of Historic Preservation Limitations

The developer shall acknowledge acceptance of preservation deed covenants and other appropriate legal limitations that are part of owning a historic property. Through the HLC-Design and Review Committee and their use of the Certificate of Appropriateness program such items, but not limited to, are required:

- Demolition of any portions of the subject property, including demolition through neglect, without the prior written consent of the HLC.
- The HLC Design Review Committee reviews any material changes to all portions of the subject property.
- The HLC will not allow the subdividing of the subject property without the prior written consent of the HLC.
- The HLC will require the agreement of the owner to allow the subject property to be listed in the National Register of Historic Places.
- The HLC reserves the *first right of first refusal* to buy the subject property at the price being offered by another buyer whenever the subject property is sold.

6.2 Other Terms and Conditions

RFP responses will become public record and will, therefore, be subject to public disclosure. However, North Carolina General Statutes Sections 132-1.2 and 66-152 provide a method of protecting some documents from public disclosure. If the buyer follows procedures prescribed by those statutes and designates a document “confidential” or “trade secret,” the HLC will withhold the document from public disclosure to the extent that is entitled or required to do so by applicant after selection.

This RFP does not represent any commitment or offer by the HLC to enter into an agreement with a buyer or to pay any costs incurred in the preparation of a response to this RFP. The finalist shall not offer any gratuities, favors, or anything of monetary value to any official or employee of Mecklenburg County, or the HLC for the purpose of influencing consideration or a response to this RFP.

The HLC reserves the right to make reasonable requests for additional information or clarification of information provided in the response without changing the terms of the RFP.

The HLC has an equal opportunity purchasing policy. Mecklenburg County entities seek to ensure that all segments of the business community have access to supplying the goods and services needed by their programs. The HLC affirmatively works to encourage utilization of minority-owned and women-owned business enterprises in all procurement activities and the HLC provides equal opportunity for all businesses and does not discriminate against any buyers regardless of race, color, religion, age, sex, national origin or disability.

7.0 ATTACHMENTS

7.1 HLC Design Standards Outline

7.2 Building and Barn Report

7.3 Site Survey

END OF REQUEST FOR PROPOSAL