



**REQUEST FOR PROPOSALS
RFP #23-1857**

CITY OF LEBANON, OHIO

**PROPOSALS FOR PROFESSIONAL SERVICES
UPDATE THE ARCHITECTURAL REVIEW OVERLAY DISTRICT AND
HISTORIC PRESERVATION GUIDELINES**

April, 2023



CITY OF LEBANON, OHIO
Department of Planning and Development

RFP # 1857

Request for Proposals for Professional
Services to Update the Architectural Review Overlay District and
Historic Preservation Guidelines

I. PROJECT

The City of Lebanon is soliciting proposals from qualified consulting firms for professional services to review the Architectural Review Overlay District and provide an update to the Historic Preservation Guidelines. The Historic Preservation Guidelines and Architectural Review Overlay District updates will be completed with input from the City Council, Planning Commission, city staff and interested citizen stakeholder groups. The city has experienced continuing growth and investment initiatives within the historic core. The primary objective of the update is to create consensus among the stakeholders regarding the direction of future development within the historic areas of the city. The update will include public meetings to gather input from citizen stakeholder groups and the presentation of findings prior to adoption of the amendments.

II. OVERVIEW

The City of Lebanon, Ohio encompasses approximately 12.5 square miles of land area in southwest Ohio between the cities of Dayton and Cincinnati. The city's proximity to the I-75 and I-71 corridors offers great accessibility locally and within the region. The community is highly developed with a mixture of mature and newer residential neighborhoods, combined with a historic central business district and a growing industrial base. The densest area of development is seen in the downtown commercial district, which is composed primarily of two and three-story brick buildings which share common walls. The commercial area in the center of town retains its nineteenth century scale and density. The Golden Lamb, located in the center of the city, has been the area's focus for over 150 years. Many of Lebanon's institutional buildings are individually included in the downtown and have enough significance for individual historic designation. The most numerous types of historic resources are older residences, whose historic styles span a period of over 100 years. The residential area to the east of downtown, the East End Historic District, is filled with mixed housing types. To the south of the downtown is Floraville Historic District, filled with significant older residential structures. Many different types and styles of architecture are represented near the downtown core. Four districts and twelve individual sites are included on the National Register.

A partial history and architecture survey of the city was conducted in 1976 by Betty Cleveland, a volunteer from the Warren County Historical Society. An expanded survey of the entire city was performed during the spring and summer of 1983 by the Miami Purchase Association, a non-profit preservation organization. This survey was supervised by Rita Walsh, architectural historian, who performed most of the historic research, with most of the photography, mapping and description performed by Jo Ann Strasser. Inclusion of properties in the inventory was based on their historical significance and/or unaltered appearance.

This research resulted in the 1984 application for the National Registration of Historic Places Inventory Nomination and subsequent inclusion of the Lebanon District to the National Historic Register. An Architectural Review Overlay (ARO) District was adopted in 1996 and is now included as part of the City of Lebanon Official Zoning Map. The ARO District contains Historic Register properties and as well additional contributing sites that are not registered.

In 2021, the City of Lebanon adopted its latest Comprehensive Plan. One of the recommendations of the Envision Lebanon Comprehensive Plan is to update the zoning code to support the current and future needs of historic areas of the City. Lebanon's new land use strategy, adopted as part of the Comprehensive Plan, represents an approach more responsive to its existing built environment and development patterns. The approach reflects the physical patterns of the built environment and encourages the use of effect overlay districts and flexible development alternatives in appropriate settings. This process should result in an extension of these principles.

III. SCOPE

Architectural Review Overlay District - Update Objectives

The consultant will develop and prepare the updates with city staff and key members of the community. The following describes specific minimum components that should be included in the scope of work. The staff will finalize the scope with the selected consultant prior to contract authorization. The city is open to suggestions other than those listed in this proposal, which consultants believe would be of value to producing the update.

- 1) The City of Lebanon is seeking a consultant to conduct a comprehensive review and update of Architectural Review Overlay (ARO) District. This analysis would include a historic inventory review of the contributing properties within the ARO District. This review involves an architecture survey to determine the status of the structures that make up the Historic District as recognized by the National Historic Register.
- 2) The historic inventory review shall also identify current inventory weaknesses, fragmented areas and inconsistent inclusion or exclusion of locations or structures. A primary area of focus for this project is an architecture survey of the properties just outside of the ARO District and their contribution and possible inclusion into the overlay.
- 3) The final analysis should reflect stakeholder concerns, strategies and comments to be included in the ARO District update.

- 4) Update the ARO District boundaries based on the findings of the technical review and stakeholder comments. The update shall also incorporate best practices that reflect the recommendations.

ARO District - Update Deliverables

- 1) The consultant shall create an updated proposed ARO District Zoning Map from the recommended updates to be placed and incorporated into the City of Lebanon Official Zoning Map by City staff.
- 2) Documentation - A report that summarizes and documents the issues, findings, and recommendations for the updates to the map.

Historic Preservation Guidelines - Update Objectives

- 1) Conduct a technical review of the Historic Preservation Guidelines for the City of Lebanon. The review shall specifically identify current code weaknesses; fragmented and inconsistent language; irrelevant and incorrect cross-references; and redundant and contradictory policies and practices.
- 2) Propose an input/involvement process for meetings that consist of “review-comment” sessions; assessing the overall content of the code, establishing benchmarks, and reviewing the project milestones.
- 3) The update will include the addition of sections or text to the code that cover issues not currently addressed and refine language that is overly restrictive in relation to its intended purpose.
- 4) The zoning code update should establish internal consistency, uniformity with industry standards, in a final form that is easily understood, and legally defensible with all current State and Federal Laws.

Zoning Code Update Deliverables

- 1) The consultant shall create the new language from the recommended updates to be placed and incorporated into the City of Lebanon Code of Ordinances by City staff. The finished product shall be clear and precise, using grammar preferred for statutes and ordinances, and avoiding legal and technical jargon whenever possible.
- 2) Documentation - Create a report that summarizes and documents the issues, findings, and recommendations for the update to the code.

Meetings and Consultation

The consultant will manage the development of the deliverables. The completion date for the code update is 8 months from the date of the contract authorized by City Council. The meetings and consultations shall include the following:

- 1) Prepare a draft work program for the update process, including necessary background research and analysis, detailed schedule of dates, stakeholder meeting dates, document

delivery dates and review periods, public meeting dates before the Planning Commission and City Council, and final review and approval by City Council.

- 2) The City anticipates the need for four scheduled stakeholder meetings to complete the updates. The general meeting process will include an initial meeting to provide an overview of the technical review and analysis, discussion of best practices, and desired outcomes. The second meeting will be to present draft outcomes and issues that can and cannot be resolved. The third and fourth meetings will be to review and implement recommendations, review the final draft of the updates, and recommend approval to the Planning Commission. City staff will arrange the meetings and mail notices of meetings. The consultant is responsible for the meeting process, content, and documentation.
- 3) The consultant will conduct an informational session before Planning Commission during a regular meeting on the code update and process. The intent of this session is to establish satisfaction and concurrence with the code update and provide a recommendation for adoption of the code.
- 4) The consultant will conduct one/two briefings in work sessions to the Lebanon City Council on the code update.
- 5) The consultant team shall be responsible for preparation of all necessary and associated correspondence, documents, project reports, and detailed meeting minutes.

IV. TENTATIVE SCHEDULE

Issue Request for Proposals - **April 16, 2023**

Proposals Due to City of Lebanon - **May 19, 2023**

Two-week Staff Review of Proposals - **June 2, 2023**

Top 3 (max.) Consultant interviews with Staff - **June 7, 2023**

Staff Selection of Top Consultant - **TBD**

Top Consultant Presentation to Council (work session) - **TBD**

Council Considers Contract (1st reading) - **TBD**

Council Authorizes Contract (2nd reading/vote) - **TBD**

Contract Signed/Executed & Notice to Proceed - **TBD**

V. PROPOSAL CONTENTS AND SUBMITTAL REQUIREMENTS

Each consultant who responds to this Request for Proposals is required to submit the information listed below. Please submit five copies of all requested materials.

- 1) Submit a cover letter or letter of transmittal.
- 2) A detailed draft Work Program for the Historic Inventory review, ARO District analysis, and zoning code update (as discussed above).

- 3) Describe the firm(s) qualifications, with emphasis on work related to the preparation of comprehensive zoning code updates, and in particular, definitions, use classifications, flexible development regulations, sign regulations, parking, landscaping, internal section reference links, other ordinance reference links, and visual graphics.
- 4) Describe the zoning codes, comprehensive plans, and other pertinent plans your firm(s) has completed in the last three years.
- 5) If this is a joint venture, explain in detail the responsibilities of each firm.
- 6) Identify the principal staff who will be assigned to this project and describe their responsibilities. Also, list recent projects on which the principal staff have worked and describe their responsibilities. **The City expects the principal staff person(s) listed will not change and will follow through the entirety of the project.**
- 7) State the approach you will use on this project, including the following information:
 - a) Overall approach to the project;
 - b) Work Program/Scope of work;
 - c) Project schedule;
 - d) Project management/staff;
 - e) Project budget breakdown; work program task, consultant, and work phases. Indicate hourly rates of individuals involved and the fee structure for additional work outside of the contract.

An attachment to the consultant agreement, as modified during contract negotiation, will incorporate the subsequent information.

- 8) Include a statement that the firm(s) has sufficient staff resources and the capability to perform the work provided your firm's Proposal within the specified period.
- 9) Provide recent project references with names and telephone numbers of contact persons.

NOTE:

1. *Consultant firms will not be reimbursed for any cost associated with the preparation of the Proposals for Professional Services.*
2. *All proposals will be public information.*

VI. SELECTION CRITERIA

The proposal evaluation and selection criteria are as follows:

1. A high level of professional competence and a proven record of accomplishment in the preparation of zoning codes, general plans, specific plans, environmental reports, and the implementation of public participation programs.
2. Demonstration of professional and technical expertise and experience of the principal personnel assigned to the project.

3. Relative proximity/location of the consultant team(s) office headquarters to the City of Lebanon, anticipates a high level of direct interaction and communication with City staff and/or public officials will occur.
4. If a joint venture, the records of accomplishment of team members' experience working together.
5. Public facilitation capabilities and experience working with the public, as well as citizen committees, in diplomatically crafting standards and/or criteria to be incorporated into the zoning code.
6. The proposal should clearly demonstrate the firms' understanding of the City's overall objectives in the comprehensive zoning code update process.
7. Ability to produce high quality documents and graphics that are user friendly.
8. Ability to make high quality oral and visual presentations using MS PowerPoint.
9. Ability to listen, be flexible, and follow and/or implement direction and/or ideas or concepts.
10. How the consultant team interacts with the public, city staff, and public officials.
11. Ability of consultant team to demonstrate initiative, motivation and knowledge of the City of Lebanon.
12. Cost of preparing the comprehensive zoning code update in relationship to the services offered.
13. Ability to complete the project within the required timeframe (12 months).
14. Review of references and work product.

VII. SELECTION PROCEDURE

Members from the Community Development Department and the Office of the City Manager will review submitted proposals and interview firms or consulting teams with the top proposals. This group will select and recommend the top qualified firm or consulting team to the City Council for final review and contract/funding approval.

VIII. PROJECT BUDGET

For the purpose of this proposal, the basis of the total budget is on the required tasks identified in your proposal and in the draft work program. The budget should include all anticipated consultant's costs including, but not limited to, meeting attendance and facilitation, correspondence and staff report preparation, document preparation and production, public information mailings, and document graphics or other necessary presentation graphics, etc.

The final consultant selection and proposed budget will be presented to City Council for approval.

IX. SIGNIFICANT MILESTONES

- Request for Proposal May 19, 2023 (submission deadline)
- Contract Authorization/Notice to Proceed TBD
- First Draft of Updates TBD
- Final Draft of Updates TBD
- Planning Commission Recommendation TBD
- City Council Public Hearing TBD
- Adoption (Ordinance) TBD
- Effective Date of Zoning Code TBD

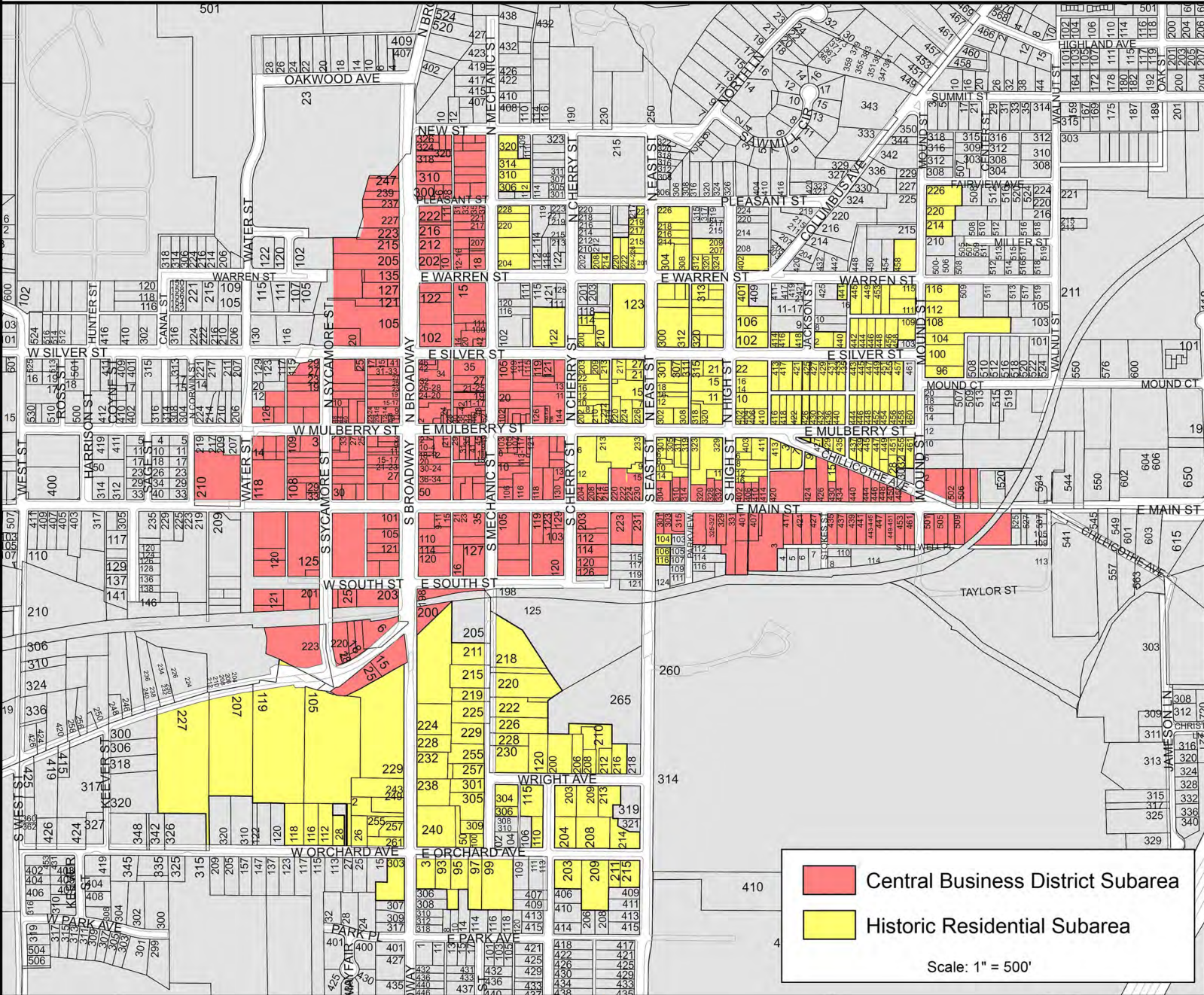
X. SUBMITTAL OF PROPOSALS

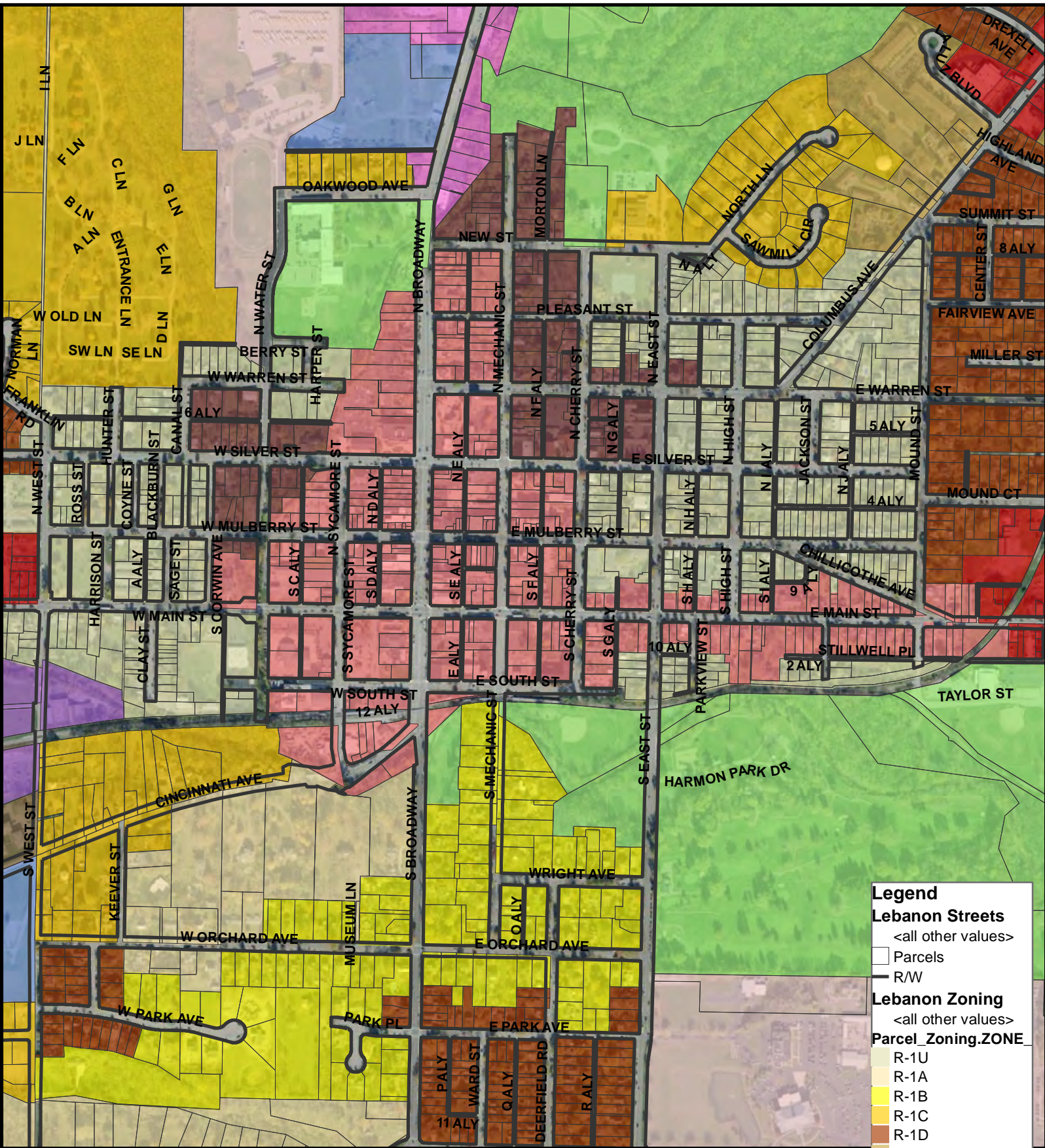
Please email and submit seven (3) copies of your firm’s proposal and supporting materials by **4:00 p.m., May 19, 2023**. Late submittals will not be accepted.

Deliver to:

City of Lebanon, Ohio
Greg Orosz, City Planner
c/o Diana Lakes, Contract Administrator
50 S. Broadway
Lebanon, OH 45036
gorosz@lebanonohio.gov

Architectural Review Overlay (ARO) District





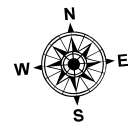
Legend

Lebanon Streets
 <all other values>
 Parcels
 R/W

Lebanon Zoning
 <all other values>

Parcel_Zoning.ZONE

- R-1U
- R-1A
- R-1B
- R-1C
- R-1D
- R-2
- R-3
- CRD
- PO
- NC
- CBD
- GC
- I-1
- MU
- P-I



1 inch = 667 feet

NOTE:
 All items shown are at approximate locations.
 All data requires field verification.

