



# REQUEST FOR PROPOSALS

## RESIDENT CURATORSHIP FLANDERS MANSION

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## RESIDENT CURATORSHIP OVERVIEW

The City of Carmel-by-the-Sea (City) is requesting proposals from individuals interested in entering into a resident curatorship agreement with the City for the rehabilitation, historic restoration and use of the City's property known as Flanders Mansion (Mansion), located at 25800 Hatton Road in Carmel-by-the-Sea, California.

A curatorship is a public-private partnership in which private individuals donate their time, skills and financial resources to rehabilitate and restore historic buildings located on government-owned land in exchange for the long-term rent-free use of the building. The prospective curator for the Flanders Mansion will be required to rehabilitate, restore, and maintain the Mansion, at his/her own expense, in exchange for the rent-free use of the Mansion as a single-family residence for a term of twenty (20) years.

Designed in 1924 by noted architect Henry Higby Guttersen, this picturesque Tudor Revival style home, with English Cottage architectural design elements, is listed on the National Register of Historic Places. As such, the prospective curator will be required to adhere to, and abide by, the Secretary of Interior's Standards for the Treatment of Historic Properties. In addition, the prospective curator is expected to repair and modernize the building's critical systems including electrical, heating and ventilation, plumbing and structural systems in accordance with current California Building Code and City standards.

Nestled within the City-owned and maintained Mission Trail Nature Preserve, the prospective curator will be responsible for nearly 6,000 square feet of livable space located on 0.83 acres of parkland. Flanders Mansion is located within Monterey County, California, about 120 miles south of San Francisco, and just a few minutes from downtown Carmel-by-the-Sea.

Founded by artists and authors, including Jack London, George Sterling, Mary Austin and Robinson Jeffers, Carmel-by-the-Sea was incorporated as a City in 1916. This one square mile City with a population of 4,000 is known for its architecture and design, cultural, dining and shopping opportunities, residential engagement, high quality of life, and scenic beauty defined by such attributes as the Carmel Beach, North Dunes Habitat Restoration Area, Mission Trail Nature Preserve and the urban forest comprised of over 9,000 public trees.

The City is seeking proposals from individuals that are able to demonstrate a commitment to historic preservation; are willing to live on City parkland and possess the skills, knowledge, interest and financial resources to complete the rehabilitation and restoration of the Mansion in a timely manner. Proposal requirements are outlined within this document. Proposals must be received by the City by close of business on Wednesday, December 12, 2018 at 5:00 PM PST.

## AN INTRODUCTION TO “OUTLANDS IN THE EIGHTY ACRES”

### Background Summary on the Flanders

In describing the Flanders Mansion, it is useful to begin with a brief introduction to the owners, Paul and Grace Flanders. Like so much of Carmel-by-the-Sea, the people, their stories and contributions to the Village are important in understanding the legacy of the physical properties they left behind.

According to various articles within the local newspaper, the Carmel Pine Cone, Commander Paul Flanders was born in Chicago in 1890 and attended Lewis Institute, the University of Illinois and the Darmstadter Technical Hochschule in Germany. He studied engineering and served as a lieutenant in the Navy during World War I, commanding sub chasers in the North Sea from a Scottish base. Mr. Flanders came to Carmel from New York in 1923 with his wife Grace, becoming an active member of the community, both socially and professionally. He was a member of the Manzanita Club, the American Legion, Masonic Lodge, and president of the Carmel Land Company, until his re-enlistment in the Navy in 1940. During World War II, Paul Flanders served as a captain in the US Navy and was in charge of mine sweepers. He was accorded full Naval honors after his death in September 1944.

Grace Livingston was born in Minnesota in 1881, attended the University of Chicago and was previously married to professor Burton Livingston, a plant pathologist. She moved to New York and became associated with several Carmelites through their mutual interest of the theater. It was in New York that Grace met, and married, Paul Flanders.

The couple moved to Carmel when Paul assumed the presidency of the Carmel Land Company. However, Grace was the one that purchased the property in the Eighty Acres Tract of the Carmel Development Company in 1920 that would become the site for the couple's home. It was also Grace that coined the home's name as "Outlands" due its solidarity location on a hillside above what is now Mountain View and Forest Streets, overlooking the Carmel Valley to the southeast, and the Carmel Mission and Point Lobos to the southwest.

In 1924, Paul and Grace Flanders commissioned San Francisco architect Henry Higby Gutterson to design their home in the English Cottage sub-style of Tudor Revival architecture. Gutterson was among the first students graduating from the newly created architecture department of the University of California in Berkley in 1906. He also attended the famed L'Ecole des Beaux Arts in Paris, joined the office of architect John Galen Howard in 1910 and then opened his own architecture office in 1914.

Working primarily in San Francisco and the Berkeley/Oakland area, Gutterson's residential work included the famed St. Francis Woods subdivision in San Francisco. This new type of development piqued Flanders' interest as a possibility for Hatton Ranch Estates (now Hatton Fields). As a partner in the Carmel Land Company, Flanders had purchased hundreds of acres of Hatton land for development.

Grace was as equally active in Carmel society as her husband and supported various philanthropic and cultural interests. She served as the secretary-treasurer and board member of the Carmel Music Society from its inception. Grace Flanders died at her home in January 1967, concluding her 45-year tenure as a Carmel resident. Based on the interests of the Flanders, it is not surprising that Outlands also served as the backdrop to social activities. According to a quote by Melanie Billing, president of the Flanders Foundation, cited in the article "Farewell Flanders" in the June 15, 2003 edition of the Monterey Herald:

*"They loved to entertain. Paul Flanders was also a great prankster and would often serve food at parties in matching colors."*



## Historical Significance

The Flanders Mansion, or Outlands in the Eighty Acres, is listed on the National Register of Historic Places primarily due to the work of the prominent architect and his innovative construction methods. Gutterson utilized a unique cavity wall system of precast interlocking concrete blocks that were locally produced by the Carmel Thermotite Company as the primary building material. Advertised as “fireproof, waterproof and practically everlasting”, the masonry construction is a unique variation of Eastern construction techniques customized to its California environment. In addition to its concrete foundation and walls, Outlands is also characterized by its steeply pitched intersecting gable roofs that are capped with irregularly laid Gladding McBean and Company’s “Berkeley” russet color small trough ceramic tiles.

Along with the old Sunset School (now the Sunset Center), Flanders Mansion is one of two properties owned by the City that are listed on the National Register of Historic Places. In 1996, Flanders Mansion was placed on the Carmel Register of Historic Places, completing its recognition by the National, State and local Registers of Historic Places.

Additional information, including the National Register of Historic Places Registration Form NRIS#89000228, published on March 23, 1989, can be found within *The Flanders Mansion Historic American Buildings Survey (HABS) Documentation* prepared for the City in March 2014 by Past Consultants, LLC. The HABS documentation is included as Attachment 1 to this RFP.

## Building Details and Condition

Constructed in 1925, this Tudor Revival (with English Cottage design elements) two-story home encompasses 5,577 square feet of gross living area, including 11 rooms, 7 bedrooms, 4.5 baths, 4 fireplaces and a small basement. Floor plans are included as appendices within the HASB.

As noted within the HABS, Flanders Mansion has a high degree of historic integrity with few alterations made since its construction in 1925. However, some interior finishes have been modified over time since the City acquired the Mansion in 1972. For example, the living and dining rooms have true divided light wood casement windows, crown molding, a masonry fireplace and hardwood floors. Other features include high ceilings and a large, partially-unfinished, full height attic. The bathrooms and kitchen have been partially remodeled and the kitchen has cabinetry and currently working appliances, including a commercial grade Wolf stove; however, most of the appliances are nearing the end of their useful life. One of the interesting features of the Flanders Mansion, which embodies the jovial nature of its owner, is a whimsical painted frieze located in the den at the west end of the home that depicts an 18th century pirate vessel landing along the coast of India.



The foundation is a concrete slab with a partial basement and crawl space, with evidence of some minor settling and minor horizontal movement notably in the southeast corner of the Mansion. The exterior walls are concrete while the interior walls are lath and plaster. While not yet tested, it appears that asbestos and/or lead is present in somewhat isolated locations throughout the Mansion. The roof's composition is ceramic tile and the gutters and downspouts are a combination of cooper or wood. The City recently repaired the roof and there are no known leaks at this time. To prepare for the upcoming winter season, the City also repaired and cleaned the gutters and installed

downspout extensions. There is a two car garage and a circular asphalt and stone driveway that can accommodate up to five vehicles. The driveway is currently also used for public parking for access into the adjacent Mission Trail Nature Preserve.

In 2009, consultant Architectural Resources Group (ARG) estimated the cost of critical building repairs, plus additional restoration of interior finishes and fixtures at \$1.15 million (\$750,000 for repairs and \$405,00 for other costs). The ARG estimate also included foundation work, re-roofing, immediately adjacent drainage improvements, patching and painting walls, and replacing carpeting. A separate 2011 appraisal estimated essentially the same repairs and renovation costs at approximately \$800,000.

The Mansion is in need of restoration work and cosmetic improvements. The costs associated with these improvements vary and will largely depend on the selected curator's approach to aesthetics and design style. As a minimum, the City will require the prospective curator to repair and update the building's critical systems to all applicable building codes and City design standards as warranted. These critical building repairs include:

- Replace and update possibly the entire electrical system throughout the Mansion, including knob and tube electrical wiring. An initial, rough order of magnitude cost estimate of \$50,000 does not include the cost of replacing light fixtures (to be researched and proposed by the curator and subject to local approval for compliance with State standards and codes and historic preservation guidelines as applicable).
- Replace the entire plumbing system upstairs, and update the plumbing system on the main level, including replacement of lead pipes within the Mansion. The rough order of magnitude cost estimate of \$40,000 does not include the cost of replacing plumbing fixtures (again to be researched and proposed by the curator subject to local approval for compliance with State codes and historic preservation guidelines as applicable).
- Retain a third party consultant to test for hazardous materials (i.e. lead, asbestos, mold). Once identified, the curator will be required to have all hazardous materials removed from the Mansion; however, if it is safe to encapsulate such materials in place, or if certain repairs can be made without "touching" certain hazardous materials, those materials may remain in place. The curator should provide an allowance of at least \$25,000 to remediate hazardous materials.
- Replace all mechanical system controls, appliances such as the furnace and hot water heater, registers, etc. All ducts shall be cleaned, tested, and repaired where required. A rough order of magnitude cost estimate for mechanical repairs is \$35,000. Currently, there is a gas heating system without central cooling.
- Installation of a fire sprinkler system. A rough order of magnitude cost is \$40,000.

These systems will be required to be updated to be in compliance with State and local codes before the selected curator will be allowed to move in and commence work on other aspects of the proposed restoration plan. As the resident curatorship is for a twenty (20) year term, there are also likely to be other costs incurred by the curator in the foreseeable future.

While preliminary estimates of the costs for upgrading the building's critical systems have been provided as an aide to help prospective curators gauge the level of work and possible cost involved, prospective curators will be required to include cost estimates and a detailed list of restoration and rehabilitation tasks and activities that include, but is not limited to, repairing and updating the identified critical systems as part of the "Restoration Schedule" (see section entitled "Proposal Requirements").

## Property and Environmental Factors

The Flanders Mansion is located in proximity to a residential neighborhood known as Hatton Fields. Hatton Fields is bounded to the north by Valley Way, to the east by US Highway 1, to the west by the City and to the south by Rio Road. Sited on the slope of a hill, the Mansion takes advantage of views that include the Carmel Valley and Santa Lucia Mountains Range, Carmel Bay and the Pacific Ocean. The terrain is rolling and naturally landscaped with mature oaks, redwoods and Monterey Pine trees. The property is zoned P-2, Improved Parkland.

Flanders Mansion is sited within and surrounded on all sides by the Mission Trail Nature Preserve (MTNP). Immediately east of the Flanders Mansion is a part of the Preserve known as the Lester Rowntree Native Plant Garden. (Upon approach to the house from the driveway off of Hatton Road, the Garden is located to the left and access to MTNP is to the right.) Initially, the parcel boundary for the Flanders Mansion was 1.43 acres. However, in order to mitigate the potential loss of public access to the MTNP, the parcel size has been reduced. The prospective curator will be required to maintain .083 acres.

### Lester Rowntree Native Plant Garden

Named after Lester Rowntree, a pioneering native plant naturalist, photographer and author of numerous writings, including the novel “Hardy Californians”, the Lester Rowntree Native Plant Garden was created in 1980 to display coastal California native plants, shrubs and trees. A City support group has assisted with maintenance over the years and has recently focused on bringing more awareness and attention to the Garden. Although the Garden is not physically located on the property that the prospective curator will be required to maintain, the Garden is immediately adjacent to the Mansion and is an integral part of the surroundings that make the Mansion area so unique. If awarded the curatorship agreement, the selected curator will be interacting with local volunteers and visitors to the Garden. As such, the prospective curator may include information regarding common interest and/or ability to assist the City and the local support group in its efforts to improve and maintain the Garden as part of the submitted proposal.

### Mission Trail Nature Preserve

The Mission Trail Nature Preserve is a City owned 34-acre park whose boundaries include the Flanders Mansion, the Lester Rowntree Native Plant Garden and the meadow off Martin Road. Various habitats observed within the Preserve include a Monterey pine forest, coast live oak woodland, wetland, willow riparian corridor and a coastal prairie. There are five trails located throughout the Preserve and the area is known for its outstanding bird watching opportunities.

MTNP is a designated Environmentally Sensitive Habitat Area (ESHA), defined by Section 30107.5 of the California Coastal Act as *“any area in which plant or animal life or their habitats are either rare or especially valuable because of their special nature or role in an ecosystem and which could be easily disturbed or degraded by human activities and developments.”*

The City is active in implementing the Mission Trail Nature Preserve Master Plan, which currently involves the removal of trees and other invasive plant species as well as improving trail signage, installing railings, and making other hardscape improvements. In addition, the Friends of Mission Trail Nature Preserve, a City support group, also assists with maintenance efforts, including periodic weekend volunteer days of “weed pulls” and other activities within the Preserve. Since the City is responsible for managing the Preserve, the City will coordinate with the curator regarding scheduling ongoing maintenance activities within the Preserve that will be performed by City staff, contractors hired by the City and volunteers.

### Mitigation Measures

The City has prepared a Final Environmental Impact Report (EIR) that addresses the impacts of a proposed lease of the Flanders Mansion and surrounding property on such factors as aesthetics, biological resources, cultural resources, land use, parks and recreation, and traffic and circulation. The California Public Resources Code requires all State and local agencies in California to establish monitoring or reporting programs for the approval of a project that requires an EIR in order to mitigate or avoid significant environmental impacts identified within the EIR. The Mitigation Monitoring and Reporting Program is Attachment 2 of this RFP and referenced within this document as the “mitigation measures.”

For example, the Mansion’s driveway currently serves as public parking and public access to the MTNP. To help ensure continued public access to the Preserve, as well as protect the privacy of the curator, there are several mitigation measures related to public parking, view shed, and the delineation of private and public boundaries through fences, hedges or exterior changes.

Even with such mitigation measures in place, there is likely to be a high level of interaction between the curator and the public. As such, a prospective curator should be aware of, and accepting of, the conditions associated with living within an active parkland. In particular, as the Mansion is located within a designated ESHA, the prospective curator should also be aware of the requirements to protect the MTNP flora and fauna as stipulated within the mitigation measures prior to the issuance of building permits or before performing construction activities.

## Open House and Property Inspection

**The City strongly encourages prospective curators to attend an open house on either Friday, November 9, 2018 from 8 am to 5 pm or Saturday, November 17, 2018 from 8 am to 4 pm for site and property inspections. Prospective curators may attend both open houses, although it is not required.**

The open house provides an opportunity to explore existing conditions on site and assist prospective curators in preparing the required Restoration Schedule.

Any architects, contractors and/or other professional and technical trades that will be working with the prospective curator are also encouraged to attend. All attendees will be required to execute a release and indemnification agreement to gain access to the Flanders Mansion.

Please be advised that the City is not honoring requests for individual appointments to visit the Mansion at this time.



## CITY CURATORSHIP REQUIREMENTS

Individuals interested in the curatorship opportunity will be required to submit a proposal as outlined within the “Proposal Requirements, Format and Submittal” section of this document. However, prospective curators should be aware of the City’s expectation regarding the curatorship as summarized below.

### Curator Characteristics

It is the intention of the City to find a curator that is passionate about historic preservation; has the skills, knowledge, interest and financial resources to complete the restoration in a prudent and timely manner; is willing to live within a nature preserve; is interested in a long-term partnership with the City and wishes to be part of the community.

### Duration and Costs

The prospective curator for the Flanders Mansion will be required to rehabilitate, renovate, and maintain the Mansion and surrounding grounds, at his/her own sole expense, in exchange for the use of the Mansion exclusively as a single-family residence rent-free for a minimum of twenty (20) years. Prospective curators may propose an alternative term. However, the minimum length of the curatorship is twenty (20) years. Occupancy will be limited to the curator and the curator’s immediate family. The curator will not be allowed to sublet or transfer the curatorship.

There is no City-issued stipend or payment for serving as a curator. In addition to the cost of the restoration work, the curator will also be responsible for any fees, possessory interest taxes, utilities and building and grounds maintenance costs throughout the term of the curatorship.

### Restoration Standards

The curator will accept the Mansion in an “AS IS” condition and follow the US Secretary of the Interior’s Standards for the Treatment of Historic Properties. In addition, the curator will be responsible for having a Preservation Plan prepared by a qualified historic preservation specialist that will provide specific standards and recommendations for the care and treatment of the Mansion and the grounds. The Preservation Plan will be required to be reviewed by the City’s Building Safety Division and then approved by the City’s Historic Resources Board (HRB).

### Restoration Schedule

The curator will have five (5) years from the start of the curatorship lease agreement to complete the critical systems repair as well as the restoration work outlined within the HRB approved Preservation Plan. The City will require a home inspection, including testing for hazardous materials. Then, the curator, in consultation with the City, will address bringing the building’s critical systems up to California and local Building Codes as necessary.

Other restoration work, including fixtures, lighting, flooring, and painting may be completed per the Curator's Proposed Restoration Schedule and approved Preservation Plan, but must also be completed within five (5) years.

### **Minimum Investment Requirement**

The City is requiring that a minimum of Sixty Thousand Dollars (\$60,000) of restoration work be completed annually over the first five (5) years. The minimum amount of investment may include the curator's time and labor ("sweat equity"), costs of contracted labor, materials and equipment.

### **Financial Requirements**

A prospective curator is required to submit a personal financial statement that lists the curator's assets and liabilities (Attachment 3 of the RFP). The purpose of this form is to demonstrate the financial capacity of a prospective curator to undertake the restoration work.

A prospective curator may be required to submit additional financial information such as a credit report and/or federal and state income tax returns for the previous three years and undergo a criminal and financial background investigation as part of the negotiation process and prior to the execution of a resident curatorship agreement.

In addition to the minimum investment requirement, the curator, if selected, will be required to either obtain a construction bond or create an escrow account for the curators' stipulated minimum investment annually for five years. The curator will also be required to carry, at his/her own expense, property insurance coverage for any and all of the furnishings and other personal property placed by the curator within the Mansion and comprehensive personal liability coverage that names the City as an additional insured. Contractors and subcontractors hired by the curator will be required to be properly licensed by the State of California, meet State prevailing wage requirements as applicable, have a City business license and meet City insurance requirements.

### **Documentation Requirements**

If selected, the curator will be required to document all restoration work through photographs or videos, maintain records of funds expended and/or the time and labor invested and submit an annual report to the City. The City will issue building permits, monitor the mitigation program and conduct required inspections during the rehabilitation and restoration phases and then on a semi-annual to annual basis thereafter for the term of the curatorship. Once the restoration is completed, there will be an opportunity for public viewing of the restoration in a format and method yet to be determined. (Once determined, the methodology for public access will be clearly specified within the resident curatorship lease agreement.)

## PROPOSAL REQUIREMENTS, FORMAT AND SUBMITTAL

Individuals interested in this curatorship opportunity are required to submit a proposal that includes the components listed below. Proposals submitted without these elements will not be considered by the City for evaluation (i.e. the City will deem the proposal “non-responsive”). Prospective curators are advised to submit proposals that are well organized, detailed, comprehensive and clear so as to ensure a thorough evaluation.

### Proposal Requirements and Format

The proposal format shall be structured in the following order:

#### 1. Letter of Interest:

This is a brief introductory letter, signed by the prospective curator, that states the prospective curator’s interest in restoring and residing at Flanders Mansion as part of a curatorship program with the City for a minimum of twenty (20) years. The letter must include:

- a. Prospective curator’s name, address, telephone number and email address.
- b. Brief written statement regarding the prospective curator’s interest in wanting to restore and reside within the Flanders Mansion.
- c. Brief written statement confirming prospective curator’s intended use of the Mansion as a single-family residence, including the total number of initial occupants and their relationship to the curator.
- d. Brief written statement confirming the prospective curator’s willingness to enter into a minimum twenty (20) year agreement with the City. The prospective curator may also suggest alternative options for the total length of a curatorship.

#### 2. Resume or Personal History Statement

The resume or personal history statement should include all professional positions held by the prospective curator regardless of whether the positions are relevant to serving as a curator. In addition, the resume or statement should highlight all experience(s) specifically related to the curatorship including experience, skills and qualifications related to such areas as historic preservation, restoration, labor trades and artisan skills. A resume or statement for each prospective curator that is part of the proposal should be included.

- a. Resume or Personal History Statement should list a chronology of all positions held by prospective curator, regardless of whether relevant to the curatorship.
- b. Resume or Personal History Statement demonstrating a prospective curator’s experience and interest in restoration, historical preservation, labor trades, artisan skills or other relevant qualifications.

- c. If the prospective curator has undertaken a similar project in the past, photographs or other documentation may be included with the proposal.
- d. The prospective curator may also include any materials that help illustrate his/her interest in the Flanders Mansion curatorship.

### 3. Consultant and Contractor Qualifications

To the extent the prospective curator plans to use consultants, contractors and/or other tradespersons as part of the restoration, the prospective curator should include a summary that lists each potential consultant, contractor, or tradesperson; indicates his/her role in the project and includes a short description of their qualifications.

- a. Summary list of potential consultants (architects, designers, historic preservation consultants, etc.), contractors and/or tradespersons proposed to be used by prospective curator for the restoration and rehabilitation work.
- b. Proposed role or task assigned to each contracted laborer.
- c. A summary of their qualifications.

### 4. Restoration Plan and Schedule

The prospective curator is required to submit a Restoration Schedule with the proposal. The Schedule must include a detailed and itemized “task by task” breakdown, a cost estimate for each task and for each year, a timeframe for completion (i.e. indicate which tasks are to be accomplished in each year of the project) and whether the task will be performed by the curator or by contract labor. **The City requires all work to be completed in five (5) years with a minimum investment of Sixty Thousand Dollars (\$60,000) each year, or a minimum commitment of Three Hundred Thousand Dollars (\$300,000) for the first five years.**

As each Restoration Schedule will be unique to the prospective curator and his/her proposed scope of work, methodology of completion, skills and use of contract labor, the City has not created a set template that must be submitted. However, the City will review the submitted schedules to ensure that all of the required elements are included and schedules with missing elements may be deemed by the City to be non-responsive to the RFP. The Restoration Schedule must include the following items:

- a. Include a detailed and itemized “task by task” breakdown.
- b. Include a schedule as to what year each task will be performed in.
- c. Include a description as to whether the task will be performed by the prospective curator or by contracted labor.

- d. Include a cost estimate for each task.
  - i. Show the amount proposed for materials and labor. The latter includes contract labor and/or an estimate of the value of the labor to be supplied by the prospective curator (“sweat equity”) as applicable.
  - ii. Show the cost estimate for each year as well as the total cost for the proposed restoration work (the “bottom line”).

## 5. Financial Statement

The prospective curator is required to submit a personal financial statement that shows the assets and liabilities for each prospective curator that is part of the proposal. In addition, the prospective curator may submit a summary on how he/she intends to finance the proposed rehabilitation and restoration work.

- a. The prospective curator will submit a personal financial statement using the form supplied by the City as Attachment 3 to this RFP.
- b. The prospective curator may submit a summary of his/her plan to finance the proposed rehabilitation and restoration work.

## 6. Project- Specific Approach

In addition to its unique architecture, the Flanders Mansion also affords a prospective curator the opportunity to live both within a quiet residential neighborhood and on City parkland. The proposal should demonstrate the prospective curator’s understanding of these conditions and willingness to comply with the City’s requirements and mitigation measures. Just as some of the mitigation measures attempt to balance public access to the MTNP and the curator’s privacy, the City also seeks a balance of promoting transparency and showcasing the restoration work completed by the curator with minimum impact to the neighborhood and Preserve. The prospective curator is encouraged to include options and ideas of ways to balance public access and promotion of the restored Mansion in a manner that reflects the surrounding environment as part of his/her proposal.

- a. The prospective curator will demonstrate his/her understanding of the City’s objectives regarding the resident curatorship program for the Mansion.
- b. The prospective curator will demonstrate an understanding of, and ability to comply with, the mitigation measures and monitoring requirements.
- c. The prospective curator may include options and ideas to encourage public access and showcase the restored Mansion that have a minimal impact to the neighborhood and Preserve.

## Proposal Questions

All questions regarding the curatorship and this RFP shall be submitted by email to Sharon Friedrichsen, the City's Director of Budget and Contracts, at [sfriedrichsen@ci.carmel.ca.us](mailto:sfriedrichsen@ci.carmel.ca.us)

The deadline for the receipt of questions is 5:00 PM PST on Monday, November 19, 2018. The City anticipates responding to the questions received by no later than 5:00 PM PST on Wednesday, November 28, 2018 and will post the questions and responses on the City's website. Depending on the nature of the questions, the City may issue an addendum to the RFP. Only such an addendum may extend the due date and time.

## Proposal Submittal Deadline

Individual(s) interested in this opportunity are required to submit one (1) original proposal and five (5) copies of the proposal and any accompanying materials by mail to the address listed below. **All proposals must be in a sealed envelope and clearly marked "Proposal for Flanders Mansion Resident Curatorship" and must be received by the City by 5:00 PM PST on Wednesday, December 12, 2018.**

### Proposals Delivered to:

US Post Office:

City of Carmel-by-the-Sea

Office of the City Clerk

P.O. Box CC

Carmel-by-the-Sea, CA 93921

FedEx, UPS or other courier service:

City of Carmel-by-the-Sea

Office of the City Clerk

Eastside of Monte Verde

between Ocean & 7th Avenues

Carmel-by-the-Sea, CA 93921

All proposals and accompanying materials submitted become the property of the City and will not be returned. The City will not consider proposals received after the deadline.

## PROPOSAL EVALUATION PROCESS AND CRITERIA

Proposals submitted to the City will be reviewed using an established evaluation process and based on specific evaluation criteria.

### Evaluation Process

Initially, City staff will review submitted proposals to ensure proposals are responsive to the RFP and include the requirements outlined in the section entitled “Proposal Format.” Proposals that intend to use the Mansion for purposes other than as a single-family residence or that are missing required elements will be deemed “non-responsive” and not evaluated further.

Upon this initial screening, proposals that are responsive to the RFP requirements will be forwarded to an Evaluation Committee that includes representatives with expertise and industry knowledge in the areas of building and construction, finance, historic preservation and planning and development. This Committee will review and rank the proposals based upon the criteria listed below. The highest ranked proposals will be forwarded to the City Council for review. The City Council will evaluate these proposals and may require additional vetting of prospective curators for any reason. The City may also conduct interviews with the highest-ranked prospective curators by a panel that may include City Councilmembers, community stakeholders and industry experts. The City will enter into negotiations with the selected curator regarding the terms of a resident curatorship lease agreement. Once the City and the selected curator have reached consensus regarding the lease terms, and contingent upon the successful completion of a credit and criminal background investigation by the selected curator, the City will calendar the approval of the agreement as part of a scheduled public hearing (Council meeting). If the City and the selected curator are not able to reach consensus, negotiations will cease and the City will negotiate with the second-highest ranked curator.

### EVALUATION CRITERIA

Proposals that pass the initial screening for responsiveness will be evaluated and ranked based upon the following criteria:

1. Planned renovations and cost estimates (Restoration Schedule)
2. Financial ability to complete the five (5) year work plan
3. Experience of the prospective curator(s) and/or their proposed professional and technical resources with historic preservation
4. Capacity to perform
5. Alignment and approach to the project

## Evaluation Matrix

Criteria	Evaluation Score
<p><b>Restoration Schedule</b></p> <ul style="list-style-type: none"> <li>▪ Level of depth and detail for tasks identified within the schedule</li> <li>▪ Logical work flow for completion of tasks</li> <li>▪ Realistic time frame for completion of work</li> <li>▪ Realistic cost estimates</li> <li>▪ Appropriateness of the restoration plan and adherence to historic preservation standards</li> </ul>	(0-35)
<p><b>Financial Ability</b></p> <ul style="list-style-type: none"> <li>▪ Financial ability to complete the five (5) year schedule</li> <li>▪ Financial ability to maintain the Mansion for fifteen (15) years</li> </ul>	(0-35)
<p><b>Experience</b></p> <ul style="list-style-type: none"> <li>▪ Curator's experience and knowledge of historic preservation</li> <li>▪ Contracted labor's experience and knowledge of historic preservation</li> <li>▪ Curator or contracted labor's experience or knowledge of home renovation, remodeling or construction</li> <li>▪ Curator or contracted labor's experience in completing a historic home renovation or similar project</li> </ul>	(0-30)
<p><b>Capacity to Perform</b></p> <ul style="list-style-type: none"> <li>▪ Curator's understanding of project scope</li> <li>▪ Ability of curator to manage the project</li> <li>▪ Adequacy and appropriateness of contracted labor</li> </ul>	(0-25)
<p><b>Alignment and Approach</b></p> <ul style="list-style-type: none"> <li>▪ Proposal's alignment with City objectives</li> <li>▪ Curator's demonstrated interest and creativity to the curatorship</li> <li>▪ Curator's approach to the length of the curatorship</li> <li>▪ Curator's understanding of and approach to living on parkland</li> <li>▪ Curator's understanding of and approach to complying with mitigation measures and documenting the restoration process</li> <li>▪ Curator's approach to collaborating with the City and other stakeholders</li> </ul>	(0-25)

## General Statements Regarding Evaluations of Responses

The City may award or not award a resident curatorship agreement with or without additional submissions or interviews with the prospective curator at the City's sole discretion. The City reserves the right to request additional information and/or presentations or informal discussions in support of the written proposals.

The City's issuance of the RFP does not commit the City to award an agreement; to pay for any costs incurred by the prospective curator in the preparation of a response to this request; or to procure or contract for services or supplies. The City reserves the right to accept or reject any or all proposals received as a result of this request, or to cancel in part or in its entirety this request for proposals if it is in the best interest of the City to do so.

The City reserves the right to waive any formalities in the process of proposals submitted and retains the right to reject any or all proposals at its discretion when deemed to be in the best interest of the City. Similarly, the City reserves the right to accept the proposal and award an agreement which will be in the best interest of the City.

The City very much appreciates the interest of individuals in considering this exciting and unique curatorship opportunity and looks forward to receiving your proposals.