

# HERITAGE BULLETIN

# 8

Tips, Ideas & More to Help Preserve Oregon's Heritage

## PRESERVATION CONSULTANTS & CONTRACTORS

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Consultants and contractors can provide valuable expertise in preservation projects. The following guidelines should be considered when you are planning to work with either.

### *Preparation Prior to Seeking Proposals (Internal Work)*

#### **Define your project.**

- Include the scope of work, components of work, timeline, requirements, preferences, etc.
- Be detailed. Include any specific products and techniques you may have.
- Put everything in writing so you are clear before you write the request for proposals.

#### **Have a budget**

- Be clear how much is available for each component.
- Know that costs may go over estimates, especially with changes to the plan.
- Be prepared to scale back or phase the project if costs exceed budget.

### *Seeking Proposals*

#### **Solicit multiple proposals**

- The Oregon State Historic Preservation Office (SHPO) maintains an impartial list of consultants and contractors. <http://www.oregonheritage.org/OPRD/HCD/publications.shtml>
- Search for recently completed, similar projects.
- Look through trade organizations.

#### **Write a request for proposals**

- Clearly write project information.
- Provide background information.
- Give a project description and goals.
- Outline a scope of work.
- List specific products to be created.
- Clarify any special requirements or conditions.
- Include level of client involvement.
- Schedule a timeline.
- Describe reporting requirements and deadlines.
- Specify requirements for written proposals.



*Selecting the Consultant or Contractor***Determine qualifications**

- Should have recent education and experience in the type of work you are attempting.
- Should have both education and experience with the work.
- Should be familiar with the Secretary of the Interior's Standards for Rehabilitation.
- May require knowledge of Section 106, special assessment or other requirements.
- Look at number and training of staff to determine competency.
- Consider availability and ability to complete in your timeframe.
- Check references on similar projects.
- Contact the Oregon Construction Contractor Board to check the license. [http://ccbed.ccb.state.or.us/New\\_Web/new\\_search.htm](http://ccbed.ccb.state.or.us/New_Web/new_search.htm)

**Questions for references**

- Were reports, documents, projects thorough and on time?
- Was communication timely and clear?
- Were they able to coordinate well with other contractors?
- Did they follow standards and special requirements?
- Did they understand and obtain appropriate permits?

**Evaluate the proposals**

- Is it clear?
- Does it cover all components of the project?
- Does the budget make sense?
- Is there a timeline with periodic deadlines or reports?
- Does the bidder have relevant and recent experience and training?
- Does the bidder have appropriate staff to complete the project?
- Is the cost competitive?
- Is payment required in advance? For larger projects usually there is a down payment required for the contractor / consultant to start work. Never pay the entire cost of the project until the project is complete and you are happy with the results. If you do pay in advance obtain a lien waiver to secure your payment.

**Notify all applicants of decision***Working with Consultants and Contractors***Monitor the work**

- Maintain communication.
- For larger projects, require regular meetings.
- If you choose to make changes after the contract is signed, make them in writing and expect to alter timeline and budget.