

## Old Library and Josiah Smith Tavern Reuse Plan

Request for Proposal Process and  
Prospective Criteria for Use Selection

May 27, 2011

### Overview

The Town of Weston owns a collection of historic buildings on a compact campus within its Center, adjacent to the Town Common – The Josiah Smith Tavern, its Barn and the Old Weston Library. Most of the buildings are vacant; the entire collection requires reinvestment and occupancy to meet Town goals. This document provides a preliminary list of criteria that may be used to select preferred approaches to adaptive reuse of the buildings among competing proposals that would be solicited using a Request for Proposals (RFP) process. The list is intended for public review and discussion, and will be the focus of an open public meeting with the Board of Selectmen on June 14 at 7:30 PM.

The Town has engaged a team of professional planners, real estate economists, designers and engineers to work with the townspeople and the Board of Selectmen to recommend reuse options that would fulfill Town goals. The team, led by The Cecil Group, has recommended that the Town employ a Request for Proposals (RFP) process to solicit specific proposals for re-use of the buildings, using selection criteria to determine the preferred approach. The successful proponents would be designated as the preferred redevelopers of the buildings, and would proceed through the necessary negotiations and approvals that would subsequently be required for the projects to move ahead.

### Background

The consultant team has prepared a Preliminary Report for public review and discussion. It provides a compilation of community-based goals and criteria. The Report considers prospective reuse options for the site and component buildings relative to these criteria. A prospective list of preferred uses has emerged. The Preliminary Report provides the context for these criteria, and can be viewed or obtained through the Town's website ([weston.govoffice.com](http://weston.govoffice.com)).

### Guide to the Draft Selection Criteria

The following assumptions and considerations have been employed to create the draft selection criteria:

- Source for the Criteria – The criteria have been assembled from among the community meetings, discussions and input gathered by the consulting team during the course of the planning process.
- Purpose as a Communication Tool – The selection criteria serve to distinguish the relative merits of competing proposals. In order to be effective, the criteria must be organized in a manner that leads to a clear and unambiguous outcome. The criteria also serve as method for communicating the Town's intentions and the prospects for proceeding to a successful outcome. Clear and reasonable



criteria will help attract responsive proposals; unclear or ambiguous criteria are likely to discourage potentially responsive proposals.

- Purpose as a Scoring and Selection Tool – The criteria are expressed as a scoring sheet that would be provided to all prospective proponents in advance, and then used to rank proposals once they are submitted.
  - Threshold Criteria – There are certain conditions that any successful proposal would need to meet in order to accomplish key Town goals. These are typically expressed as “threshold criteria.” Any proposal not meeting the threshold criteria would not be considered for further review and consideration.
  - Comparative Selection Criteria – The comparative selection criteria are used to establish a numerical ranking relative to the Town’s expressed goals for proposals that meet all threshold criteria.
  - Priorities – Some criteria are more important than others. A weighting factor expresses the Town’s priorities. A higher value weighting factor is associated with higher priorities; lower value weighting factors are associated with relatively less important criteria.
  - Conflicts and Trade-Offs – Not all of the criteria are consistent with one another. The scoring and weighting system is the method used to establish an answer that balances conflicting factors.
  - Applicability to Multiple RFPs – The process, timing and scope of an RFP process are under discussion, and no related decisions have been made. The Cecil Group has suggested that the Town issue two separate RFPs – one for the Old Library, and one for the Josiah Smith Tavern/Barn complex. Other options include issuing a single RFP for the entire campus, or separate RFP’s for the Library, Barn and Tavern. The following criteria are intended to support a range of possible approaches.
  - Relationship to Final RFP Criteria – The criteria provided in this document are intended to clarify the Town’s intentions and priorities in anticipation of subsequent steps in advancing the reuse and improvement of the buildings. The final RFP criteria would need to be further developed and coordinated as part of the preparation and approval of an RFP prior to issuance.
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## Prospective Criteria for Selection of Reuse and Redevelopment Proposals

### Threshold Criteria

The following criteria must be met by any proposal:

*Compliance (Y/N)*

1. Complete use of the building – No proposal will be accepted for reuse, improvement or stabilization of only a portion of the building that is the subject of the RFP.
  2. Demonstration of financial capacity – The proposing entity must demonstrate the financial capacity to maintain and operate the premises for the term of the agreement without any operating or ongoing subsidy or expense to the Town. This will include but not be limited to the financial capacity of the proponent to make purchase or lease payments, initial capital improvements not funded by agreement with the Town, taxes, insurance, utilities, maintenance and capital replacement reserves, common charges for shared parking, site maintenance or site septic systems, or any other cost that would be otherwise be the Town's responsibility.
  3. Compliance with all applicable historic preservation restrictions – The reuse and renovation must comply with all existing historic preservation restrictions applicable to the structures.
  4. Restriction on demolition – None of the structures subject to the RFP may be demolished.
  5. Conformance with Town CPA funding requirements – Any reuse or renovation must be consistent with the legal standards and public purposes associated with the Town's previous or proposed Community Preservation Act funds on any of the buildings.
  6. Conformance with applicable Massachusetts regulations – Any proposal must demonstrate the capacity to comply with any applicable Massachusetts regulations and standards including, but not limited to wastewater and stormwater regulations, wetlands and waterways, building codes, and accessibility.
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## Comparative Criteria for Selection of Reuse and Redevelopment Proposals

### Heritage and Character

*Goal: Retain integrity and provide active use*

#### 1. Historic Preservation

*(Note: Compliance with existing historic preservation deed restrictions on the Josiah Smith Tavern and Barn is a threshold criterion. The following criteria will be applied to those proposals that have demonstrated their compliance with this threshold.)*

Compliance  
Score

##### 1.1 Building Exterior

High comparative score: Restores and maintains building exterior meeting Secretary of Interior Standards for Historic Preservation.

Low comparative score: Has significant exterior alterations that are prominently visible and inconsistent with the historic character of the original building.

##### 1.2 Building Interior

High comparative score: Restores and maintains building interior meeting Secretary of Interior Standards for Historic Preservation.

Low comparative score: Substantially changes interior in a manner that is inconsistent with the historic character and prevents potential future historic restoration.

#### 2. Aesthetic Integrity of the Town Center

High comparative score: Maintains a balance of building and planted open space and limits views of parked cars from the adjacent streets.

Low comparative score: Expands building coverage, reduces landscaping, does not limit or buffer views of parked cars from adjacent streets.

#### 3. Enhanced Vibrancy of the Town Center

High comparative score: Provides multiple uses that include activity during weekdays, evenings and weekends for a wide spectrum of users (patrons, citizens and visitors and employees).

Low comparative score: Provides limited range of uses, limited periods of activity, and a narrow spectrum of users.

#### 4. Availability of Building for Active Public Use

High comparative score: Provides predominately civic-oriented uses, services or shops that are likely to be frequented by a broad range of citizens and patrons.

Low comparative score: Provides uses that are normally not open to the public or have very limited likely patrons.

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## Town Funding and Management

*Goal: Lower cost, risk, and maintain Town controls*

Compliance  
Score

### 5. Financial Sustainability

High comparative score: Provides substantial evidence of financial capabilities and specific enforceable mechanisms to ensure financial sustainability without relying on Town expenditures for the term of the agreement. The agreement would also be for a long-term duration.

Low comparative score: Provides limited evidence of financial capabilities and no enforceable mechanisms to ensure financial sustainability without relying on Town expenditures for the term of the agreement. The agreement would also be for a short-term duration.

### 6. Town Control

High comparative score: Provides for Town control to ensure the consistency of the project with the original proposed and approved reuse plans using lease, disposition or other forms of agreement that have reliable and practical enforcement mechanisms.

Low comparative score: Provides no practical or reliable mechanisms for Town control beyond zoning or other existing regulatory standards after execution of lease or disposition agreements.

### 7. Town Risk

High comparative score: The Town is likely to have limited costs or legal liability if the proponent fails to comply with the terms and conditions of the lease or disposition agreement.

Low comparative score: The Town is likely to have significant costs or legal liability if the proponent fails to comply with the terms and conditions of the lease or disposition agreement.

### 8. Town Costs (CPA Sources)

High comparative score: The proponent requires no Town funds (CPA fund resources) to provide for capital improvements associated with their proposal.

Low comparative score: The proponent requires significant Town funds (CPA fund resources) to provide for capital improvements associated with their proposal, exceeding likely resources available and reducing the capacity of the Town to support other worthy purposes.

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## Impacts

*Goal: Minimize, mitigate or make compatible*

*Compliance  
Score*

### 9. Traffic

High comparative score: The proposal would not trigger off-site mitigation to meet typical safety standards for traffic operations directly attributable to the increased traffic demand or circulation patterns created by the project.

Low comparative score: The proposal would trigger off-site mitigation at full Town expense to meet typical safety standards for traffic operations directly attributable to the increased traffic demand or circulation patterns created by the project.

### 10. Parking

High comparative score: The proposal can reasonably provide for normal peak parking requirements associated with its uses without compromising the ability to occupy and use all of the buildings on the campus. The parking supply consists of dedicated parking spaces or shared parking spaces on the “campus” and reasonable reliance on nearby-on street parking.

Low comparative score: The proposal cannot reasonably provide for normal peak parking requirements associated with its uses and compromises the ability to fully occupy and use all of the buildings, taking into account dedicated parking spaces or shared parking spaces on the “campus”, and reasonable reliance on nearby-on street parking.

### 11. Environment

High comparative score: The proposal provides measures that would enhance the environment at the site using technology, design or best management practices.

Low comparative score: The proposal provides no measures that would protect or enhance the environment at the site beyond the applicable local, state and federal requirements that are threshold requirements.

### 12. Abutting Property

High comparative score: The proponent provides significantly greater separation of improvements than would be required by zoning and provides landscaped buffering from the adjacent parcel.

Low comparative score: The proposal meets the minimum zoning standards for site development and has no parking within the required sideyard setback.

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## Comparative Score Sheet

**Compliance Scoring:** Compliance with criteria would be scored, based on the review of the relevant aspects of a specific proposal. The scoring would be within an established range. For example, a range of 1 to 10 might be used, with 1 representing low compliance, and 10 being full compliance.

**Weighting Factors:** The weighting factors represent relative importance of each criteria. A scale of 1 to 5 is suggested. A factor of 1 would be the lowest relative priority. A criteria assigned a factor of 2 would be twice as important, and so on. The weighting factors indicated below are for discussion purposes, but reflect the analysis and input assembled by the consultant team to date.

**Weighted Scores:** The weighted scores for each criteria are established by multiplying the compliance score with the weighting factors.

**Total Scores:** The total score for any proposal is the sum of all weighted scores.

<i>Compliance Score</i>		<i>Weighting Factor</i>		<i>Weighted Score</i>	
<input type="text"/>	X	<input type="text" value="4"/>	=	<input type="text"/>	<b>Heritage and Character</b> <i>Goal: Retain integrity and provide active use</i>
<input type="text"/>	X	<input type="text" value="2"/>	=	<input type="text"/>	1.1 Building Exterior
<input type="text"/>	X	<input type="text" value="2"/>	=	<input type="text"/>	1.2 Building Interior
<input type="text"/>	X	<input type="text" value="2"/>	=	<input type="text"/>	2. Aesthetic Integrity of the Town Center
<input type="text"/>	X	<input type="text" value="2"/>	=	<input type="text"/>	3. Enhanced Vibrancy of the Town Center
<input type="text"/>	X	<input type="text" value="2"/>	=	<input type="text"/>	4. Availability of Building for Active Public Use
<input type="text"/>	X	<input type="text" value="5"/>	=	<input type="text"/>	<b>Town Funding and Management</b> <i>Goal: Lower cost, risk, and maintain Town controls</i>
<input type="text"/>	X	<input type="text" value="3"/>	=	<input type="text"/>	5. Financial Sustainability
<input type="text"/>	X	<input type="text" value="1"/>	=	<input type="text"/>	6. Town Control
<input type="text"/>	X	<input type="text" value="2"/>	=	<input type="text"/>	7. Town Risk
<input type="text"/>	X	<input type="text" value="2"/>	=	<input type="text"/>	8. Town Costs (CPA Sources)
<input type="text"/>	X	<input type="text" value="2"/>	=	<input type="text"/>	<b>Impacts</b> <i>Goal: Minimize, mitigate or make compatible</i>
<input type="text"/>	X	<input type="text" value="3"/>	=	<input type="text"/>	9. Traffic
<input type="text"/>	X	<input type="text" value="1"/>	=	<input type="text"/>	10. Parking
<input type="text"/>	X	<input type="text" value="1"/>	=	<input type="text"/>	11. Environment
<input type="text"/>	X	<input type="text" value="1"/>	=	<input type="text"/>	12. Abutting Property
					
<input type="text"/>					<b>TOTAL PROPOSAL SCORE</b>