

RFQ 24-1001

TOWN OF CONCORD
COMMUNITYWIDE HISTORIC PRESERVATION PLAN

Submitted to the
**Concord Historical Commission,
Historic Districts Commission, and
Planning Division
Concord, Massachusetts**



submitted by
Heritage Strategies, LLC

September 13, 2023

HERITAGE *strategies*



September 13, 2023

Ms. Gail Dowd, Interim Procurement Manager
Ms. Ann Clifford, Senior Planner
Town of Concord
22 Monument Square
Concord, MA 01742

**Re: Concord Communitywide Historic Preservation Plan
Request for Quotations; RFQ #24-1001**

Dear Ms. Dowd and Ms. Clifford:

Heritage Strategies, LLC is pleased to submit this Request for Quotations to prepare a Communitywide Historic Preservation Plan for the Town of Concord.

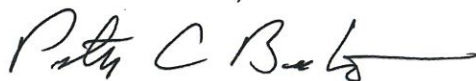
The Communitywide Historic Preservation Plan prepared for Concord will take a broad-based approach to the role of historic preservation in the Town's planning, growth management, conservation, and community enhancement strategies. It will coordinate closely with previous and ongoing planning for Concord providing input with respect to historic resources and landscapes. The plan will coordinate with the Town's comprehensive long range plan, *Envision Concord: Bridge to 2030*; the 2010 West Concord Village Center Master Plan; six local historic districts; Town bylaws; and related plans and processes. The plan will recognize the central role of historic character to Concord's identity and quality of life and will address the relationship of historic preservation to all aspects of Town activity.

Heritage Strategies specializes in preservation planning for historic communities. We have worked in historic communities across the United States and are experienced in working with community preservation programs and historical commissions. We are familiar with Concord through our planning work with the **Freedom's Way National Heritage Area**, through which we have focused upon community interpretation, heritage tourism, and the preservation and enhancement of community character.

Our staff exceeds the Secretary of the Interior's Professional Qualifications Standards, and we are thoroughly familiar with the Secretary of the Interior's Standards for the Treatment of Historic Properties.

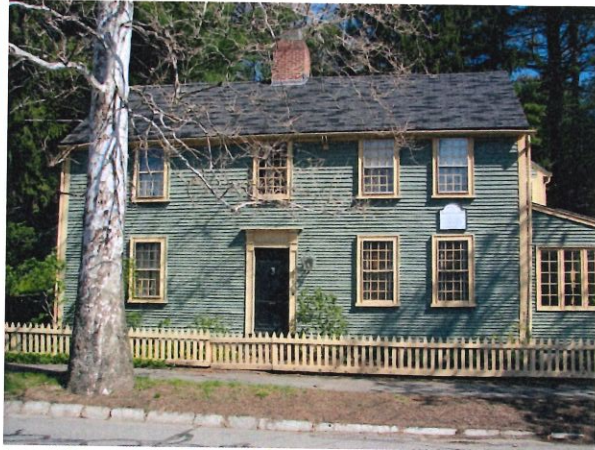
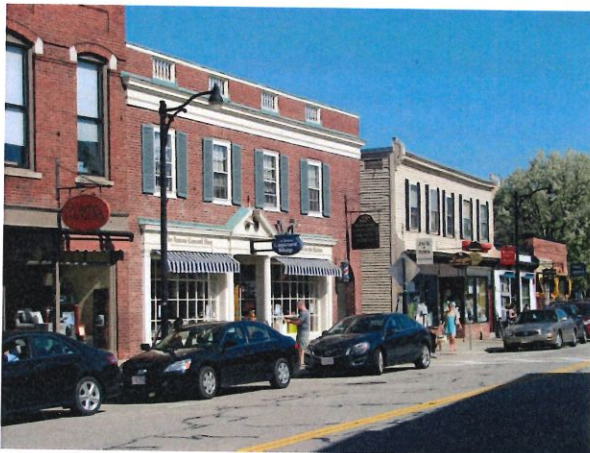
We look forward to the opportunity of working with you. We have enclosed five (5) bound copies and one digital copy of our submission for your review and consideration as well as electronic copies of three samples of our work, preservation plans we completed for Lenox MA, Beverly MA, and Sudbury MA under Massachusetts Historical Commission guidance. Should you have any questions regarding this proposal, please do not hesitate to contact me by phone at 484-354-2385 or by email at pbenton@heritagestrategies.com.

Sincerely,
HERITAGE STRATEGIES, LLC



Peter C. Benton, RA
Principal

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Heritage Strategies became familiar with the Town of Concord and its historic resources through our preparation of a management plan for Freedom's Way National Heritage Area, which includes the Town. We continue to work with Freedom's Way on current planning initiatives.

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Additional Information

- Resumes
- Representative Project Experience

Required Forms

- Price Quotation Form/Vendor Signature Form
- Certificate of Non-Collusion
- Statement of State Tax Compliance
- Addenda Acknowledgement Form

Work Samples:

- Historic Preservation Plan for the Town of Lenox, MA
 - Historic Preservation Plan for the City of Beverly, MA
 - Historic Preservation Plan for the Town of Sudbury, MA
- (Electronic copies included on a thumb drive with this proposal)

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In the Fall of 2022, Heritage Strategies completed a Communitywide Historic Preservation Plan for the Town of Sudbury, located at the western edge of the Boston Metropolitan Area. The project was undertaken using a planning grant from the National Park Service through the Massachusetts Historical Commission.

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1.0 INTRODUCTION

Heritage Strategies, LLC is pleased to submit this Request for Qualifications to prepare a Communitywide Historic Preservation Plan for the Town of Concord.

The proposed plan will take a broad-based approach to the role of historic preservation in the Town's planning, preservation, conservation, and community enhancement strategies. The plan will coordinate with the Town's comprehensive long range plan, *Envision Concord: Bridge to 2030*; the 2010 West Concord Village Center Master Plan; six local historic districts; Town bylaws; and related plans and processes. The plan will recognize the central role of historic character to Concord's identity and quality of life and will address the relationship of historic preservation to all aspects of Town activity.

We specialize in preservation planning for historic communities. Our plans assist communities in preserving and enhancing their historic character while accommodating change. Key points relative to our qualifications and experience include:

Heritage Strategies is experienced in the preparation of community preservation plans. We have prepared preservation plans and design guidelines for communities of many types, from small crossroads villages to conservation landscapes to urban centers. Our preservation plans embrace the broad goals and wide range of activities communities are engaged with. We understand how to tailor preservation programs to the interests and character of the community and its residents.

Heritage Strategies has national experience and perspective. With our national experience, we bring fresh eyes to preservation planning in Concord. We have addressed a wide range of circumstances in historic communities across the country, and we know how to find what works best.

Heritage Strategies is experienced working in Massachusetts. We are familiar with Concord through our previous and ongoing planning work with the **Freedom's Way National Heritage Area**. In 2018 we completed a preservation plan for the **Town of Lenox, MA** in the Berkshires; in 2020 we completed a preservation plan for the **City of Beverly**; and last year we completed a preservation plan for the **Town of Sudbury**—all three projects with funding from and in compliance with the scope provided by the Massachusetts Historical Commission. Samples of the plans are included with this proposal. In 2014, we prepared a preservation plan for the **Town of Falmouth** on Cape Cod. Please see the Representative Project Experience and work samples included with this proposal.

Heritage Strategies helps build public support for preservation. We implement public participation programs that engage residents and stakeholders, identify their interests and capabilities, and tailor preservation strategies to their strengths. One of our principals, Elizabeth Watson, is a professional facilitator and is skilled in conducting public participation workshops.

Heritage Strategies uses historic preservation as a basis for community enhancement. We use preservation as a means to achieve the revitalization and enhancement of historic communities. Our experience with National Heritage Areas in particular focuses upon preservation programs that use community interpretation and heritage tourism to build public support for preservation in strengthening community identity.

Heritage Strategies is experienced in the adaptive reuse of historic buildings and landscapes. We have implemented many rehabilitation and adaptive reuse projects involving historic buildings and landscapes, which helps give our preservation planning the depth of real-life application. We have worked with property owners, developers, and conservation organizations and understand how historic preservation and other planning tools work in their interests.

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Heritage Strategies prepared a preservation plan for the Town of Lenox in the Berkshires in 2018 through a Massachusetts Historical Commission grant.



We completed a preservation plan for the City of Beverly in 2020, also through a Massachusetts Historical Commission grant.

2.0 QUALIFICATIONS AND PERSONNEL

Heritage Strategies, LLC

Heritage Strategies is a preservation planning firm established in 2009 by three long-time colleagues with extensive experience in historic preservation. Heritage Strategies specializes in work with historic communities, historic properties, cultural landscapes, and National Heritage Areas. Heritage Strategies principals are former senior staff of John Milner Associates, Inc., and led many of JMA's projects in preservation planning, design guidelines, cultural landscapes, and historic preservation. The firm is a small, woman-owned business based in Pennsylvania. We work on projects across the nation—current and recent projects range from Massachusetts to North Carolina, west to Colorado and Arizona.

Historic Communities

Heritage Strategies staff has worked with many communities focusing on the stewardship of heritage resources and the enhancement of community character. We are experienced in adaptive reuse of historic buildings, revitalization of historic downtowns, and strengthening of historic neighborhoods. We recognize that economic viability is central to community success, and we help partners collaborate to reinforce the best aspects of their communities.

Heritage Strategies' expertise ranges from the preparation of community preservation plans and design guidelines to the implementation of comprehensive planning and revitalization strategies. Our project approach relies upon building consensus among constituents around shared values. We are experienced in working with local, state, and federal review agencies having responsibility for compliance with historic preservation programs and regulations.

Historic Properties

Heritage Strategies is experienced in the rehabilitation and adaptive reuse of historic buildings and landscapes. Our work with historic properties includes master plans, feasibility studies, conceptual designs, interpretive plans, and historic structure reports. We have worked with nonprofit historic sites, institutions such as colleges and universities, government entities, developers, and private property owners. Heritage Strategies has extensive experience in project implementation for both historic buildings and landscapes.

We are familiar with the complexities involved in adapting historic buildings and landscapes to modern uses without compromising historic integrity. This familiarity includes not only accommodation of modern programmatic requirements within a historic context, but also compliance with modern building codes; provision of handicapped access; the installation of modern mechanical, electrical, lighting, and fire safety systems; and ecological and site engineering considerations.

Cultural Landscapes

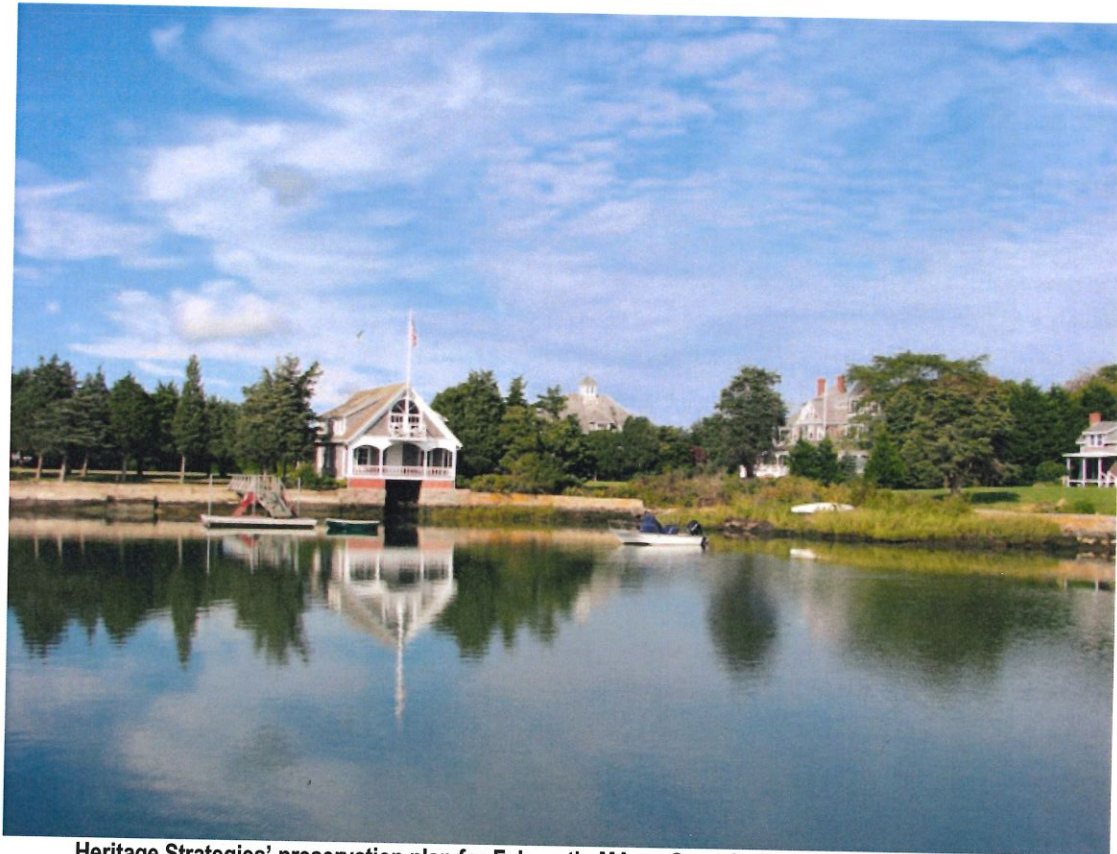
Heritage Strategies is experienced in the preparation of cultural landscape reports, landscape management plans, and landscape conservation and design strategies. Much of our project experience stems from work on cultural landscape reports for the National Park Service. Our work ranges from the preparation of cultural landscape assessments and reports for national parks to the development of comprehensive landscape preservation and management plans for communities and private clients.

Heritage Strategies staff is experienced in the methodology for assessing cultural landscapes through the recognition of historical contexts and significance, identification of character defining patterns and features, analysis of issues and opportunities, and development of appropriate treatment guidelines and recommendations.

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National Heritage Areas

Heritage Strategies principals have undertaken planning and implementation projects for more than seventeen state and national heritage areas, including **Freedom's Way National Heritage Area** in Massachusetts. All of our heritage area projects have included the development of heritage tourism initiatives, interpretive plans, stewardship strategies, and implementation programs involving multiple historic and cultural sites and multiple partners at local, state, and federal levels. Heritage Strategies' plans outline strategies to strengthen heritage tourism and development as central to regional economic revitalization.



Heritage Strategies' preservation plan for Falmouth, MA on Cape Cod addressed issues related to development pressure on pristine historic villages and landscapes.

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Heritage Strategies Personnel

Information on the Heritage Strategies personnel who will be directly involved in the project is presented in resumes at the end of this proposal. Our experience and roles in the project are summarized below. Heritage Strategies staff fully meets requirements of the Secretary of the Interior's Guidelines for Professional Qualifications Standards (36 CFR Part 61, Appendix A) for professionals working in the field of historic preservation.

A. Elizabeth Watson, FAICP – Project Manager / Preservation and Community Planner

Elizabeth Watson is a Principal of Heritage Strategies and a nationally recognized leader in heritage development and community stewardship, known for her knowledge, energy, and creativity combined with practical experience.

As Project Manager, Elizabeth will be the primary point of contact with the Town for contracting and the planning process. Elizabeth will lead a detailed field survey of the Town focusing on the types and range of resources, their treatment and condition, and role that the Town's historic resources play in community character and identity. Elizabeth will review existing policies, programs, and planning processes to provide guidance for Town officials and stakeholders as they make planning and development decisions that could affect the character of the community. This will include review of the Town's long range planning, master planning, and historic preservation programs.

Elizabeth will take the lead in public engagement and discussions with stakeholders, particularly in the proposed focus group sessions outlined in the scope of work. Elizabeth is an experienced community facilitator, author, and editor.

Peter C. Benton, RA – Historical Architect / Preservation Planner

Peter Benton is a Principal with Heritage Strategies and a registered architect with thirty years' experience in the design and execution of architecture and preservation planning projects. Peter will serve as Historical Architect and Preservation Planner for work on the historic preservation plan. Peter will collaborate closely with Elizabeth Watson in all aspects of the project, particularly in the development of strategies and recommendations.

Peter will focus on the range, condition, and issues related to historic resources, including Concord's local historic districts, Village Center, MACRIS inventories, National Register listings, and cultural landscape context. He will collaborate with Elizabeth in assessing community stewardship strategies, including public planning policy, heritage tourism, and engagement with partnering organizations. Peter will examine the role that historic resources play in the Town's conservation and enhancement strategies. With Elizabeth Watson, Peter will be a principal author of the plan.



Heritage Strategies prepared design guidelines for the Town of Wellesley's local historic districts.

3.0 PROJECT APPROACH AND SCOPE OF WORK

The Town of Concord seeks to prepare a comprehensive, Communitywide Historic Preservation Plan addressing the key role that historic resources play in the Town's identity and quality of life. As outlined in the RFQ, the Historic Preservation Plan will coordinate closely with Concord's 2018 comprehensive plan, *Envision Concord: Bridge to 2030* as well as other Town planning documents. The Preservation Plan will reflect Concord's unique character and community values and will coordinate with other planning initiatives in addressing issues outlined in the RFQ and to be further explored through the Scope of Work outlined below.

Concord's Historic Preservation Plan will demonstrate how historic preservation principles and best practices can play a central role in addressing Town-wide planning issues while preserving, strengthening, and enhancing the Town's distinctive historic character. Balancing the role of heritage tourism is critical in Concord—accommodating visitors and supporting the local economy while preserving local quality of life for residents. Smart growth strategies due to the intense pressure from suburbanization and commuter rail access will be informed by and balanced with best practices in preservation and adaptive reuse—accommodating needed change while preserving and strengthening character—using change as a vehicle to achieve community goals.

The Communitywide Historic Preservation Plan will take a holistic approach to historic preservation, recognizing the full scope of ways in which historic resources and historic character touch community life. We take a landscape approach to historic preservation that focuses upon identifying the character defining aspects of the Town's historic landscape as it has developed over time and helping the community preserve and enhance it through public and private recognition and initiative.

The Historic Preservation Plan will recognize the progress made in Concord, both in terms of historic preservation—through education, interpretation, and heritage tourism; inventories of historic resources; designation of local historic districts; National Register listings; master planning; identification of Heritage Landscapes; land conservation; and other initiatives—and in terms of overall community planning and enhancement—through best practices in planning, economic development, community design, open space conservation, arts and culture, and other initiatives.

The Historic Preservation Plan will go beyond the traditional tools used in historic preservation practice. The role of historic preservation and community character in Concord's ongoing growth and change will be emphasized. The potential for recognition of the full range of historic resources and landscapes will be discussed along with creative ways in which the Town's Village Center, historic properties, historic road corridors, conservation lands, and residential neighborhoods can continue to be preserved and enhanced. Particular focus will be given to supporting the preservation and appropriate treatment of historic buildings by property owners throughout the landscape through non-regulatory means.

The hallmark of the Heritage Strategies approach is the personal involvement we give to our projects and the close collaborative relationships we develop with our clients and their partners. Our plans address long-term programmatic sustainability by offering measurable steps and achievable results. Preparation of an updated Historic Preservation Plan will provide Concord with a focused document concentrating specifically upon the community's unique issues and opportunities. The Plan will outline the vision and strategies that the Select Board, commissions, committees, community stakeholders, and residents can use to ensure that preservation plays an important role in Concord's identity and continued evolution. Throughout the project, we will be committed to creative, realistic, and achievable results that support Concord's long-term planning and community development goals and objectives.

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Scope of Work

In order to assist Concord with the preparation of a Communitywide Historic Preservation Plan, Heritage Strategies proposes the following Scope of Work. This Scope of Work closely follows the scope outlined in Attachment A of the Request for Quotations issued by the Town and provided by the Massachusetts Historical Commission, which we will adhere to. At the time we begin outlining and working on the Draft Plan, we may recommend minor adjustments to the anticipated table of contents for the plan based upon existing conditions and stakeholder input. We look forward to discussing the Scope of Work with you and refining it as desired.

PHASE I - BACKGROUND

Task 1.1 – Initial Meeting

An initial meeting will be held with Heritage Strategies, Concord's Town Planner and Senior Planner (Planning staff) and staff of the Massachusetts Historical Commission (MHC staff), and others as appropriate to review the goals, scope of work, schedule, and protocols for the project. The initial meeting may be held virtually.

Task 1.2 – Model Preservation Plans

As requested in the RFQ, Heritage Strategies will review a minimum of three recent historic preservation plans from communities outside of Massachusetts that have advanced, progressive, and successful preservation programs. The team will prepare a brief description of the plans and general approach and how they may relate to planning for the Town of Concord. *Deliverable: A Review and Analysis of Model Historic Preservation Plans*

Task 1.3 – Introduction to Preservation Planning

Heritage Strategies will prepare introductory text outlining what historic preservation is, why historic preservation planning is needed, and what a historic preservation plan is. It is anticipated the text will be incorporated into the introduction to the Draft Communitywide Historic Preservation Plan for Concord. A portion of the text may also be included in an appendix to the plan. *Deliverable: Introduction to Historic Preservation Planning*

Task 1.4 – Historical Commission/Historic Districts Commission Meeting #1

Heritage Strategies will meet representatives of the Concord Historical Commission and Historic Districts Commission. The purpose of the meeting will be to present an overview of the planning approach and scope of work and to conduct an initial discussion of issues, goals, and objectives for the preservation plan. It is anticipated that the Commissions will serve as a steering committee for the project, meeting with Heritage Strategies and Planning staff at key points in the planning process to provide input and recommendations. *Deliverables: PowerPoint presentation outlining the work process.*

At the time of this meeting and subsequently, Heritage Strategies will begin a comprehensive field review of Concord to become familiar with the Town, local historic districts, Village Center, National Register listings, other historic

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properties, historic road corridors, historic landscapes, and other resources. The field review will focus on resource types, resource conditions, development trends, and growth management issues. The team will review the status and condition of Town-owned historic properties during the field review process.

Digital photographs will be taken during field review work to document characteristic resources and existing conditions to illustrate the preservation plan. Additional field survey work will be undertaken throughout the planning process as appropriate.

Task 1.5 – Partners and Stakeholders

Heritage Strategies will develop a list of preservation partners and stakeholders in Concord who may have an interest or role in the preservation plan. The list will include municipal departments, commissions and committees, neighborhood groups, conservation organizations, local elected officials, interpretive sites, federal and state partners, regional planning agency, local or regional tourism and business organizations, social organizations, economic development organizations as appropriate. A brief description of each partner or stakeholder will be prepared.

Deliverable: Annotated List of Preservation Partners and Stakeholders

Task 1.6 – Historical Development

Heritage Strategies will review the historical development of Concord including settlement patterns, architecture, demography, neighborhoods, transportation, industry, housing, and commerce. The team will prepare a historic context for the Town based on Concord's well documented existing histories and survey summaries encompassing pre-contact to present day periods. A description of what a historic context is will be included. *Deliverable: Historic Context for Concord*

Task 1.7 – Previous Planning Documents

Heritage Strategies will review previous planning documents including the 2018 comprehensive long range master plan, *Envision Concord: Bridge to 2030*, previous historic preservation plan, open space & recreation plan, village and neighborhood master plans, economic development plans, regional plans, heritage landscape plans, and other relevant Town planning documents. Additional documents may include preservation reports, maps, and recommendations on historic and cultural resources as available. Documents not available online will be provided to the team by Planning staff. Heritage Strategies will prepare a chronological narrative that includes plans, reports, major projects, and events related to planning and historic preservation in Concord. *Deliverable: History of Historic Preservation in Concord*

Task 1.8 – Historic Resource Inventories

Heritage Strategies will review and analyze existing inventory forms for Concord based on current MHC standards as represented in the Massachusetts Cultural Resource Inventory System (MACRIS). The team will undertake a reconnaissance to assess inventory coverage Town-wide and prepare an analysis of the current status of the inventory. The analysis will include a description of what historic properties inventories are. *Deliverable: Historic Properties Inventory Analysis*

Task 1.9 – National Register Analysis

Heritage Strategies will review current nominations for National Register listed properties and districts in Concord, existing National Register eligibility recommendations including those made by previous surveys, and will identify properties that may be potentially eligible for listing in the National Register. The team will prepare an analysis of the current level of National Register listings in the Town. The introduction to the analysis shall include a description of the National Register of Historic Places program. *Deliverable: National Register of Historic Places Analysis*

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Task 1.10 – Bylaws and Regulations

Heritage Strategies will undertake a review of existing Town bylaws and regulations that could impact historic properties including, at a minimum, zoning, building codes, design review, demolition delay, local historic district, scenic roads, wetlands, subdivision regulations, signage, and site plan review. The team shall prepare an overview and analysis of existing municipal bylaws and regulations. *Deliverable: Municipal Bylaw and Regulations Analysis*

Task 1.11 – Phase I Review Meeting

Heritage Strategies will meet with the Town's Planning staff and Massachusetts Historical Commission (MHC) staff to review Phase I activities and work products.

PHASE II - OUTREACH

Task 2.1 – Stakeholder Outreach

Heritage Strategies will reach out to stakeholders within the Town to be identified with the assistance of the Planning staff, Historical Commission, and Historic Districts Commission. Stakeholders will include representatives of Town commissions and committees, Town staff, and partners and stakeholders identified in Task 1.4 above. Outreach may take the form of in-person meetings, virtual meetings, phone interviews, email communications, and/or other forms of communication such as the focus groups discussed below. It is recommended that Heritage Strategies meet with the Town Manager and interested members of the Select Board to review Town goals, processes, and priorities.

Heritage Strategies proposes that in-person outreach be undertaken through the use of **Focus Groups**. Heritage Strategies will facilitate three to four focus group sessions to obtain input from governmental entities, interest groups, and organizations within the Town. Specific focus group topics will be determined in discussion with Planning staff, Historical Commission, and Historic Districts Commission and will include engagement with public officials, community businesses, neighborhood residents, local preservation interests, conservation interests, historic or interpretive sites, owners of historic buildings, and/or area developers.

Focus group sessions are generally 1½ hour discussions that focus on identifying areas of concern, major issues, and goals for the planning process and for historic preservation in the Town. Input received through the focus group sessions and other forms of stakeholder outreach will be considered by the team as the planning process moves forward. With respect to Town department and leadership stakeholder outreach, the Heritage Strategies team will review municipal policy and management.

Task 2.2 – Public Workshop #1

Heritage Strategies will facilitate a public workshop to seek input and discussion from residents and various community organizations and individuals not part of the focus group discussions. Planning staff and Historical Commission members should participate in the workshop discussion. Attendance and participation at the public workshop by a diverse group of Town residents will be encouraged and is integral to a successful planning process. The workshop will be scheduled in consultation with the Planning staff with the goal of having strong attendance. Planning staff will be responsible for organizing the workshop including publicizing the meeting to the community. Depending upon protocols at the time, the meeting may be held virtually.

Heritage Strategies will give a brief PowerPoint presentation on the planning process, goals, and findings to date. Heritage Strategies will review its existing conditions assessment of Concord, the Town's historic character, and the identification of issues and opportunities. Heritage Strategies will engage attendees in an open forum to discuss what they perceive to be the goals and issues associated with historic preservation and community character in Concord. Feedback from attendees will be welcomed and documented for further consideration by the Historical Commission and the project team. *Deliverable: (1) PowerPoint Presentation, (2) Public Awareness and Engagement Analysis*

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Task 2.3 – Historical Commission/Historic Districts Commission Meeting #2

Heritage Strategies will facilitate a second meeting of members of the Historical Commission and Historic Districts Commission to review and discuss work completed to date, including the review of existing resources, public workshop, historical overview, and focus group sessions.

This meeting will occur virtually or, if not, during the same trip as the focus group sessions and public workshop. A presentation of Heritage Strategies' initial findings will be made to the Commissions who will provide feedback and guidance to the project team. A primary purpose of the meeting will be to review a potential vision and goals for historic preservation within the Town.

Task 2.4 – Outline of Issues and Challenges

Based upon the existing conditions analysis and other work completed to date, Heritage Strategies will prepare an outline of issues and challenges with respect to the Town's historic resources, historic landscapes, and community character. The outline will include a description of the types of historic resources currently found in Concord, recent and potential losses, ongoing and anticipated issues and challenges to protecting and preserving the Town's historic and archaeological resources. This outline will provide the basis for initial discussions on vision, goals, alternatives, and recommendations. A Draft Table of Contents for the Preservation Plan will be provided for review and discussion. *Deliverable: (1) Overview of Historic Preservation Issues and Challenges, (2) Draft Table of Contents*

Task 2.5 – Phase II Review Meeting

Following the completion of work through Task 2.4, Heritage Strategies and Town Planning staff will meet with staff of the Massachusetts Historical Commission (MHC) to review the progress of the work and initial recommendations.



Heritage Strategies' preservation plan for Asheville, North Carolina focused on historic neighborhoods and also addressed planning for surrounding rural Buncombe County.

PHASE III - RECOMMENDATIONS

Task 3.1 – Draft Vision and Goals Statement

Based upon the analysis of existing conditions and the Town's planning, Heritage Strategies will prepare draft vision and goals statements for the Communitywide Historic Preservation Plan for review by and discussion with Planning staff, Historical Commission, Historic Districts Commission, and other stakeholders. *Deliverable: Draft Vision and Goals Statements*

Task 3.2 – Preservation Plan Strategies and Recommendations

Based upon the information developed through tasks undertaken above, Heritage Strategies will prepare specific preservation-related strategies, recommendations, and actions for Concord that will focus on a wide range of planning topics. Annotated strategies and recommendations for the future of preservation and planning in the Town will be developed in outline form, including:

- Historic properties inventory recommendations – including phased recommendations for continued and updated communitywide inventories;
- National Register recommendations – including for individual properties and districts;
- Public awareness/education recommendations
- Municipal bylaws and regulations recommendations – including recommendations for changes in zoning and proposed new preservation-related bylaws and changes to municipal historic resource management;
- Outline for a five-year preservation Action Plan.

Deliverable: Strategies and Recommendations

Task 3.3 – Historical Commission/Historic Districts Commission Meeting #3

Heritage Strategies will meet virtually with members of the Historical Commission and Historic Districts Commission in a work session to review the preservation approach and draft recommendations and actions for the Historic Preservation Plan. The purpose of the meeting will be to review and refine the recommendations in accordance with community values and interests. Input and feedback from Commission members and other attendees will be integrated, as appropriate, into the Draft Historic Preservation Plan. Implementation and priorities will be reviewed.

Task 3.4 – Public Workshop #2, Focus Groups, and Meetings with Town Leaders

Heritage Strategies will facilitate a second public workshop to discuss the preservation approach and draft recommendations and actions for the Historic Preservation Plan to receive public input. A PowerPoint presentation will be developed to present recommendations to workshop attendees. The presentation will be followed by an open, interactive forum for stakeholders and residents to ask questions and provide comments to the planning team, Town Planning staff, and Historical Commission. The public workshop may be held virtually.

In addition, Heritage Strategies suggests reconvening the key **Focus Groups** from Task 2.1 above to review and discuss recommendations related to their specific topics of interest. Heritage Strategies also recommends meeting informally with the Town Manager and interested members of the Select Board at this time to review recommendations and obtain input. Planning staff will be responsible for the logistics, organization, and publicizing of the focus group and public meetings, which may be held virtually. *Deliverable: (1) PowerPoint presentation, (2) Summary Report of Public Forum Comments*

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Task 3.5 – Draft Communitywide Historic Preservation Plan

Following the review, refinement, and approval of recommendations as outlined in Tasks 3.1 through 3.4 above, a Draft Communitywide Historic Preservation Plan will be prepared by Heritage Strategies. A digital copy of the Draft Preservation Plan will be provided to Planning staff, Historical Commission, Historic Districts Commission, and MHC staff for review and comment. Chapters may be submitted on a rolling basis. Comments and requests for changes and modifications to the plan will be consolidated into a single document by Planning staff and provided to Heritage Strategies, who will make requested changes to the draft plan.

The Historic Preservation Plan for Concord will present a **five-year action plan** incorporating historic preservation interests and actions into the broad range of the Town's programs and initiatives. The plan as a whole, however, will have a longer horizon and applicability. As outlined in the RFQ and pending further discussions with Planning staff and MHC, it is anticipated that the Draft Communitywide Historic Preservation Plan will include the following components:

I. Executive Summary

II. Introduction

- Introduction to Historic Preservation Planning
- Historic Context for the Town of Concord
- History of Historic Preservation Planning in Concord
- Annotated List of Preservation Partners and Stakeholders in Concord

III. Issues and Opportunities

- The Historic Properties Inventory – Analysis of Existing Documentation and Needs
- The National Register of Historic Places – Analysis of Existing Listings and Eligibility
- Local Public Awareness and Engagement Analysis
- Municipal Bylaws, Regulations, and Management Analysis

IV. Recommendations

- The Historic Properties Inventory – Survey Priorities
- National Register of Historic Places – Priorities for Listing Inventoried Properties—Priorities for Preservation, Levels of Need
- Public Awareness/Education
- Municipal Policy, Regulations, and Management

V. Action Plan

VI. Bibliography

At the time Heritage Strategies begins outlining and working on the Draft Plan, the team may recommend minor adjustments to the anticipated table of contents for the plan based upon existing conditions, Town programs and priorities, and stakeholder input.

Task 3.6 – Phase III Review Meeting

Following the completion of work through Task 3.5, Heritage Strategies and Town Planning staff will meet with staff of the Massachusetts Historical Commission (MHC) to review the progress of the work and comments on the Draft Plan.

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PHASE IV – FINAL PLAN

Task 4.1 – Final Communitywide Historic Preservation Plan

Heritage Strategies will make final revisions requested by the Planning staff, Historical Commission, Historic Districts Commission, and MHC staff and will prepare a digital PDF copy of the final Communitywide Historic Preservation Plan for distribution and publication. An Executive Summary of the Historic Preservation Plan will be prepared suitable for online posting and distribution as a stand-alone document. Planning staff will coordinate submission of the final plan for formal approval by the Town entities as appropriate.

- Deliverables:
- Five (5) bound copies of the Concord Communitywide Historic Preservation Plan provided to the Town of Concord*
 - One (1) electronic PDF copy of the Concord Communitywide Historic Preservation Plan provided to the Town of Concord*
 - Two (2) bound copies of the Concord Communitywide Historic Preservation Plan provided to MHC*
 - One (1) electronic PDF copy of the Concord Communitywide Historic Preservation Plan provided to MHC*



Heritage Strategies completed a preservation plan for the City of Joplin, Missouri and later assisted their Downtown Main Street program in developing a revolving fund to assist business owners.

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4.0 PROJECT SCHEDULE

Heritage Strategies has prepared the project schedule below for preparation of the Communitywide Historic Preservation Plan for Concord in accordance with the schedule included in the Request for Quotations. The team is flexible with regard to scheduling and will consult with Planning staff, MHC, and Historical Commission during Task 1.1 in detailing and refining the schedule in accordance with the Town's planning needs and processes, including MHC grant requirements.

PHASE I - BACKGROUND

Tasks 1.1 through 1.11 – Background Research and Analysis

December 22, 2023

PHASE II - OUTREACH

Tasks 2.1 through 2.5 – Stakeholder and Public Outreach

March 15, 2024

PHASE III - RECOMMENDATIONS

Tasks 3.1 through 3.6 – Recommendations and Draft Preservation Plan

May 3, 2024

PHASE IV – FINAL PLAN

Task 4.1 – Final Communitywide Preservation Plan

June 28, 2024



Heritage Strategies completed a preservation plan for Jefferson City, the state capital of Missouri, in 2019.

5.0 REFERENCES

Heritage Strategies personnel have a wide range of historic preservation experience in working with historic communities and historic sites. The range of our experience can be seen in the projects listed in the resumes and as examples of representative experience included at the end of this proposal. Both Elizabeth Watson and Peter Benton worked on all of the projects described.

Heritage Strategies offers the following references relative to several of these projects and our experience in preservation planning for historic communities. PDF copies of the Sudbury, Beverly, and Lenox Historic Preservation Plans have been submitted as work samples with this proposal.

Freedom's Way National Heritage Area, Management Plan – preparation of a management plan for the National Heritage Area as required by Congress and including Concord as a particular area of focus and interpretation. Elizabeth Watson served as Project Manager. The plan was completed in 2015, and Heritage Strategies continues to undertake follow-up planning work for Freedom's Way.

Ms. Patrice Todisco, Executive Director
Freedom's Way National Heritage Area
94 Jackson Road, Suite 311
Devens, MA 01434
(978) 722-3654
ptodisco@freedomsway.org

Town of Sudbury, Massachusetts, Historic Preservation Plan – project was completed in September 2022. Peter Benton was lead on the project with support from Elizabeth Watson. The project utilized a MHC grant.

Ms. Diana Warren, Vice Chair, Historical Commission & MHC Local Project Coordinator
dewwarren@gmail.com

Chris Hagger, Chair, Historical Commission
cldh7@aol.com

Town of Sudbury
268 Old Sudbury Road
Sudbury, MA 01776

City of Beverly, Massachusetts, Historic Preservation Plan – completed the in the Fall of 2020. Peter Benton was lead on the project with support from Elizabeth Watson. The project utilized a MHC grant.

Ms. Emily Hutchings, AICP, Senior Planner
City of Somerville
ehutchings@somervillema.gov

Note: Emily was the Assistant Planner in Beverly responsible for preparation of the Historic Preservation Plan, but she now works for the City of Somerville.

Ms. Darlene Wynne, AICP, Director of Planning & Development
City of Beverly
191 Cabot Street
Beverly, MA 01915

TOWN OF CONCORD, MASSACHUSETTS
COMMUNITYWIDE HISTORIC PRESERVATION PLAN

(978) 605-2341
dwynne@beverlyma.gov

Town of Lenox, Massachusetts, Historic Preservation Plan – Heritage Strategies completed the Historic Preservation Plan for Lenox in September 2019. The plan was undertaken with a planning grant from the Massachusetts Historical Commission, who were involved in project review and approval.

Ms. Gwen Miller, AICP, Land Use Director/Town Planner
Town of Lenox
6 Walker Street
Lenox, MA 01246
(413) 637-5500 x6
gmiller@townoflenox.com



Heritage Strategies prepared a historic preservation plan for Northampton County, Pennsylvania, which includes the historic cities of Bethlehem and Easton, numerous boroughs and crossroad villages, and a historic agricultural landscape undergoing intense suburban development pressure.

TOWN OF CONCORD, MASSACHUSETTS
COMMUNITYWIDE HISTORIC PRESERVATION PLAN

6.0 PRICE QUOTATION

Heritage Strategies proposes to undertake the preparation of the Communitywide Historic Preservation Plan for Concord as outlined in the Request for Quotations for the lump sum fee of Forty-eight Thousand Four Hundred Dollars (\$48,400) including the cost of all reimbursable expenses. The budget spreadsheet below outlines the personnel, hours, and fees associated with the tasks presented in the Scope of Work and are summarized by Phase.

	Elizabeth Watson	Peter Benton	Fee per Task
Phase I - Background			\$14,500
Initial Meeting	8	8	\$800
Model Preservation Plans	12	8	\$1,000
Introduction to Preservation Planning	8	4	\$600
Commissions Meeting #1	8	4	\$600
Partners and Stakeholders	40	12	\$2,600
Historical Development	32	12	\$2,200
Previous Planning Documents	22	12	\$1,700
Historic Resource Inventories	16	8	\$1,200
National Register Analysis	20	8	\$1,400
Bylaws and Regulations	20	16	\$1,800
Phase I Review Meeting	8	4	\$600
Phase II - Outreach			\$8,900
Stakeholder Outreach	54	24	\$3,900
Public Workshop #1	12	8	\$1,000
Commissions Meeting #2	8	4	\$600
Outline of Issues & Challenges	32	24	\$2,800
Phase II Review Meeting	8	4	\$600
Phase III - Recommendations			\$20,600
Draft Vision and Goals Statement	8	4	\$600
Strategies and Recommendations	60	40	\$5,000
Commissions Meeting #3	8	8	\$800
Public Workshop #2, Focus Groups	16	12	\$1,400
Draft Historic Preservation Plan	160	84	\$12,200
Phase III Review Meeting	8	4	\$600
Phase IV - Final Plan			\$4,400
Final Preservation Plan	60	28	\$4,400
Subtotal of hours per person	628	340	
Rate per hour	\$50.00	\$50.00	
TOTAL FEE			\$48,400

TOWN OF CONCORD, MASSACHUSETTS
COMMUNITYWIDE HISTORIC PRESERVATION PLAN



Heritage Strategies prepared a preservation plan for Topeka, the state capital of Kansas. Later, we were asked to prepare design guidelines for revitalization of their Downtown Historic District.

HERITAGE *strategies*



Statement of Qualifications

Heritage Strategies, LLC, is a professional consulting firm specializing in planning for historic communities, cultural landscapes, heritage areas, and historic properties. Our firm helps clients strengthen their communities by creatively recognizing, reinforcing, and enhancing the rich and diverse heritage embodied within them. Broad in scope, scale, and geography, our project experience has given us the ability to envision possibilities and shape tangible solutions.

Heritage Strategies is a collaboration of three long-time colleagues whose interdisciplinary specialties encompass the fields of planning, landscape architecture, and architecture—all focused on historic preservation and heritage development. We work closely together to craft a multi-disciplined and targeted planning approach that addresses the unique challenges and opportunities inherent in each project. Our clients are as diverse as the sites they represent and include federal, state, and local government entities, non-profit organizations, foundations, and private citizens.

Historic Communities

- Preservation Plans
- Community Revitalization Plans
- Design Guidelines
- Interpretive Plans
- Comprehensive Plans
- Ordinances
- Facilitation and Consensus-Building
- Project Implementation

Cultural Landscapes

- Cultural Landscape Reports
- Cultural Landscape Assessments
- Landscape Management Plans
- Landscape Conservation and Design
- Site Master Plans

Heritage Areas

- Heritage Area Management Plans
- Scenic Byway Plans
- Heritage Development Programs
- Implementation Projects

Historic Properties

- Master Plans
- Conceptual Design and Feasibility Studies
- Conditions Assessments
- Interpretive Plans
- Historic Structure Reports
- Strategic Planning and Facilitation
- Implementation Projects

HERITAGE *strategies*

A. Elizabeth Watson, FAICP

Principal, Heritage Strategies, LLC

Education

1994 Harvard University, Graduate School of Design, Loeb Fellowship in Advanced Environmental Design

1981 Pennsylvania State University, Master of Regional Planning, Phi Kappa Phi

1976 University of Florida Preservation Institute, Graduate Studies in Historic Preservation

1974 Wake Forest University, Bachelor of Arts in History, Guy T. Carswell Scholar; cum laude

Experience Profile



Elizabeth Watson is a Principal of Heritage Strategies and a nationally recognized leader in heritage development and community stewardship, known for her knowledge, energy, and creativity combined with practical experience. Elizabeth is a co-author of *Saving America's Countryside*, the National Trust's guide to preserving American communities and landscapes. Her community facilitation skills help inspire broad support for projects in which she is engaged.

As an independent consultant and former senior staff member at John Milner Associates, Inc., Elizabeth has prepared management plans and strategic plans for more than a dozen state and national heritage areas, most in collaboration with other Heritage Strategies principals. Her heritage area plans focus specifically upon preservation planning for historic communities and revitalization strategies through heritage development. Most recently, she was responsible for the Historic Preservation Master Plan for Asheville and Buncombe County, NC, and the management plan for Freedom's Way National Heritage Area in central Massachusetts and southern New Hampshire, which included a historic preservation plan within a larger "stewardship" plan for this 45-town/city region.

Representative Projects

City of Asheville Preservation Plan, Asheville, North Carolina

Comprehensive preservation plan for this unique city in the mountains of North Carolina that incorporated historic preservation into downtown revitalization and development, strengthened neighborhood planning, and emphasized the role of historic preservation as a community value in relation to sustainability, tourism, and the arts.

Butte-Anaconda Heritage Corridor Plan, Montana

Project director for an interpretive, revitalization, and heritage tourism plan for Butte and Anaconda, Montana and an interpretive greenway linking the two communities featuring the region's copper mining history and recent reclamation.

City of Joplin Preservation Plan, Joplin, Missouri

Preservation master plan for a city in southwest Missouri that developed in the early twentieth century as the business and commercial center of a regional mining district. In 2011 Joplin experienced a devastating tornado. The preservation plan reinforced tornado recovery efforts and the city's economic development strategy, focusing on downtown and neighborhood revitalization.

City of Topeka Preservation Plan, Topeka, Kansas

Comprehensive preservation plan for Topeka, the state capital of Kansas. The plan incorporated historic preservation into the city's economic development and revitalization strategies through the revitalization of the historic downtown, city-wide interpretation and heritage tourism, and neighborhood master plans.

Town of Falmouth Preservation Plan, Falmouth, Massachusetts

Preservation plan for a vibrant summer community on western Cape Cod that strengthened the role of the town's historical commission and historic districts commission and helped create an independent historic preservation non-profit trust to partner with local land conservation organizations.

Town of Lenox Preservation Plan, Lenox, Massachusetts

Preservation plan for a historic town located in the Berkshires of western Massachusetts and home to Tanglewood, summer home of the Boston Symphony. Lenox is a historic early 19th century village that became a summer destination for the wealthy during the Gilded Age. Its preservation plan focused on the town's economic role as a heritage tourism destination, using historic character to support community well-being.

Niagara Falls National Heritage Area Management Plan, Niagara Falls, New York

Project planner for this National Heritage Area telling the rich stories of Niagara Falls, including its natural history, central role in the French and Indian War, role in the nation's conservation movement, and industrial history as the place where large scale electrical generation was first undertaken.

Abraham Lincoln National Heritage Area Management Plan, Central Illinois

Project planner for a National Heritage Area telling the nationally significant story of Abraham Lincoln's life and times in Ante-bellum America. The plan focuses upon engaging residents in the revitalization of the historic agricultural communities through appreciation of the region's role as an evolving frontier in the pre-Civil War Era.

Delaware & Lehigh National Heritage Corridor Management Action Plan, Pennsylvania

Principal planner with Mary Means & Associates for preparation of a management plan for one of the earliest national heritage areas, completed in 1994 and still in use in this five-county region of eastern Pennsylvania, including Wilkes-Barre, Allentown, Bethlehem, Easton, and Bristol. Heritage Strategies updated the management plan in 2013. Next steps in the plan's implementation envision the canal trail being a platform for community revitalization, education, heritage tourism, and interpretation about the region's significance to the American Industrial Revolution. Both plans involved extensive public facilitation.

Crossroads of the American Revolution National Heritage Area Management Plan, New Jersey

Project planner for a management plan for a National Heritage Area related to New Jersey's central role in the American Revolution. The plan focuses upon telling the region's Revolutionary War stories, preserving Revolutionary Era resources and landscapes, and engaging historic communities.

Sangre de Cristo National Heritage Area Management Plan, San Luis Valley, Colorado

Project director for a National Heritage Area focused upon the preservation of the unique Hispano heritage of the southern San Luis Valley and the revitalization of the valley's historic communities through heritage initiatives.

Silos & Smokestacks National Heritage Area Interpretive Plan, Iowa

Project planner for a plan interpreting the story American agriculture. The plan developed interpretive themes and guidelines for presentation and included a workbook of potential projects, tools and media.

Outer Banks Scenic Byway Corridor Management Plan and National Scenic Byway Nomination

Project director for preparation of a scenic byway corridor plan for this internationally recognized North Carolina coastal region, and a successful federal nomination based on the region's cultural and natural intrinsic qualities, emphasizing the interrelationship of maritime communities with a 400-year-old relationship to land, sea, and sound.

HERITAGE *strategies*

Peter C. Benton, RA

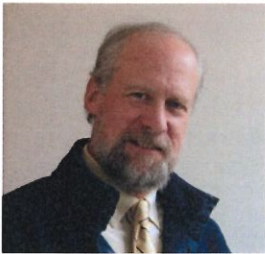
Principal, Heritage Strategies, LLC

Education

1979 University of Pennsylvania, Master's Degree in Architecture

1972 University of Virginia, Bachelor of Science in Architecture

Experience Profile



Peter Benton is a registered architect and planner with thirty years experience in the design and execution of architecture, planning and preservation planning projects. For twenty-five years, Peter served as project architect, principal preservation planner, senior associate, and associate director for John Milner Associates, Inc., nationally recognized leaders in historic preservation. At JMA, Peter had primary responsibility for the firm's planning and heritage development projects. The primary focus of his work has been the recognition and respect for the character and historical evolution of buildings and the landscapes in which they are located.

Peter has been responsible for a wide range of architectural projects involving the restoration, rehabilitation and adaptive reuse of historic buildings. His main interest, however, has been in planning for historic communities and landscapes. Peter is experienced in the preparation of community preservation and revitalization plans, design guidelines for communities and institutions, historic structure reports, management plans for heritage areas, master plans for historic properties, and interpretive plans for historic landscapes. He understands the value of community partnerships in achieving common goals, and his broad experience demonstrates his ability to conceive projects with vision and implement projects with practical determination.

Representative Projects

City of Allentown Historic Preservation Plan, Allentown, Pennsylvania

Historic preservation plan for a major industrial city in southeastern Pennsylvania. Allentown was a manufacturing center for Mack Trucks and other nationally known products in the first half of the 20th century. The preservation plan was based on the city's recent comprehensive plan and focused on the revitalization and enhancement of character in the city's many neighborhoods, some of which were economically challenged.

Northampton County Historic and Cultural Assets Plan, Northampton County, Pennsylvania

Northampton County is home to the historic cities of Bethlehem and Easton, major industrial and manufacturing centers, as well as small urban boroughs, crossroad villages, 19th century farmland, and growing suburbs. Local stakeholders chose to focus the county's preservation plan on interpretation and heritage tourism, seeking to raise public awareness about how historic resources contribute to the region's quality of life.

City of Beverly Historic Preservation Plan, Beverly, Massachusetts

Beverly is a coastal city adjacent to Salem, north of Boston. Linked to Boston by commuter rail, the city and surrounding suburbs continue to grow and develop as a desirable place to live. The city's preservation plan recommended the inventory and designation of its somewhat neglected inner city neighborhoods while supporting conservation and enhancement in the outer suburbs.

Town of Lenox Preservation Plan, Lenox, Massachusetts

Preservation plan for a historic town located in the Berkshires of western Massachusetts and home to Tanglewood, summer home of the Boston Symphony. Lenox is a historic early 19th century village that became a summer destination for the wealthy during the Gilded Age. Its preservation plan focused on the town's economic role as a heritage tourism destination, using historic character to support community well-being.

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Comprehensive preservation plan for this unique city in the mountains of North Carolina that incorporated historic preservation into downtown revitalization and development, strengthened neighborhood planning, and emphasized the role of historic preservation as a community value in relation to sustainability, tourism, and the arts.

Town of Falmouth Preservation Plan, Falmouth, Massachusetts

Preservation plan for a vibrant summer community on western Cape Cod that strengthened the role of the town's historical commission and historic districts commission and helped create an independent historic preservation non-profit trust to partner with local land conservation organizations.

City of Topeka Preservation Plan, Topeka, Kansas

Comprehensive preservation plan for Topeka, the state capital of Kansas. The plan incorporated historic preservation into the city's economic development and revitalization strategies through the revitalization of the historic downtown, city-wide interpretation and heritage tourism, and neighborhood master plans.

City of Independence Preservation Plan, Independence, Missouri

Project manager and author of a comprehensive preservation plan for the City of Independence. The city is the county seat and has a core of nineteenth century neighborhoods surrounded by a vast area of early twentieth century residential development. Independence is best known for the Harry S. Truman National Historic Site and as the beginning of the Santa Fe Trail.

Old Wethersfield Master Plan, Wethersfield, Connecticut

Project director for a master plan for Connecticut's first town, founded in 1635. The plan focused on preserving historic buildings and landscapes, revitalizing the historic village core, and interpretation for residents and visitors.

City of Baltimore Design Guidelines, Baltimore, Maryland

Project manager and co-author of comprehensive design guidelines for Baltimore's thirty-three local historic districts for use by property owners and the city's Commission for Historical and Architectural Preservation.

Professional & Public Service

Preservation Pennsylvania, Board of Directors (2010-2017) Chairman (2015-2017)

Preservation Alliance for Greater Philadelphia, Board of Directors (2002-2011) Vice Chairman (2009)

Preservation Action, Washington, DC, Board of Directors (2000-2022) Secretary (2009-17) Treasurer (2017-18)

Preservation Action Foundation, Washington, DC, Board of Directors (2005-2022)

Chester County Historic Preservation Network, Board of Directors (1991-2009)

Chester County Conference and Visitors Bureau, Board of Directors (1994-2006) President (2000-2003)

HERITAGE *strategies*

Freedom's Way National Heritage Area *Management Plan*

Location: Massachusetts and New Hampshire

Client: Freedom's Way Heritage Association

Project Manager: Peter C. Benton

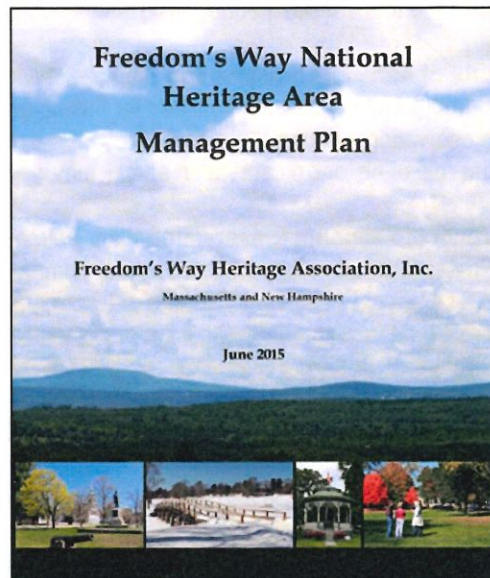
Principal Heritage Area Planner & Facilitator: Elizabeth Watson

The Freedom's Way National Heritage Area, designated by Congress in 2009, encompasses 45 towns and an area of 994 square miles extending almost 55 miles from metropolitan Boston to its northwestern boundary in New Hampshire. Events at Concord and Lexington on April 19, 1775, serve as a touchstone for the region, where most towns contributed patriots to fight the running battle that began the American Revolution.

Shaped by rivers and wetlands, the landscape here has inspired generations of writers, philosophers, and visionaries. It includes Walden Pond, where Henry David Thoreau lived from 1845 to 1847, birthplace of the American conservation movement. Nearly 25 percent of the region is permanently protected, including three national wildlife refuges and 21 state parks, forests, and public recreation areas. Many miles of local and regional trails enrich the experience of the landscape. More than 340 historic sites and districts are listed in the National Register.

The region's culture is a distinctive force that has shaped both the landscape and the evolution of America's identity over the past four centuries. Steeped in concepts of individual freedom and responsibility, community cooperation, direct democracy, idealism, and social betterment, this perspective has informed national and international movements in governance, education, abolition, social justice, conservation, and the arts.

The management plan for Freedom's Way is designed to foster a close working relationship among local and regional partners, governmental agencies, and the private sector to preserve the character of the region. It includes unique chapters on communications, interpretation, and the cultural landscape, blending approaches to both conservation and historic preservation and reinforcing the region's sense of its singular identity.



Battle Road Trail, Minute Man National Historical Park

HERITAGE *strategies*

Lenox, Massachusetts *Historic Preservation Plan*

Location: Lenox, Massachusetts
Client: Town of Lenox
Prime Consultant: Heritage Strategies, LLC



The Mount – 1902 estate of author Edith Wharton, now a prominent visitor cultural attraction

The Town of Lenox is located in the heart of the Berkshires of western Massachusetts and is known for its natural beauty, cultural amenities, and quality of life. During the late 19th century, Lenox became a summer destination for wealthy families of the Gilded Age. Today, it remains a visitor destination and is the home of Tanglewood and other attractions.

Lenox prepared a Historic Preservation Plan that examines the role of historic and cultural resources in the Town and how those resources can be preserved and enhanced as Lenox continues to grow and evolve.

The plan takes a landscape approach, looking at landscape patterns and features to understand how landscape context has changed over time and continues to be a primary determinant of Town character. The plan identifies a broad range of tools and activities including those traditional to the field of historic preservation but also those related to other disciplines and interests.



The historic early 19th century village of Lenox is a center for restaurants and shopping.



A number of country estates have been adapted into bed and breakfasts, spas, and other visitor amenities.



18th century community church and cemetery.

HERITAGE *strategies*

Town of Falmouth *Historic Preservation Plan*

Location: Falmouth, Massachusetts
Client: Town of Falmouth
Prime Consultant: Heritage Strategies, LLC



Boathouse and mansions along Falmouth's western coast.

Located on the western end of Cape Cod, Falmouth was founded in the seventeenth century as a farming community and developed into a center for whaling and other maritime activities. With the coming of the railroad in the late eighteenth century, Falmouth transformed into a summer resort community popular with wealthy families from Boston. Shingle style mansions and beach cottages were constructed along the picturesque coastline close to the historic villages.

Falmouth experienced rapid growth in the late twentieth century as the Cape became more accessible by automobile. Neighborhoods of suburban style second homes filled the landscape near the water, and the town's harbors filled with sailboats and other recreational craft.

Today Falmouth is thriving as a summer destination. Heritage Strategies is assisting the town in preserving the historic buildings and landscapes that contribute to the town's special character.



Shops in the harbor village of Woods Hole.



Cottage in a historic planned neighborhood near the beach.

HERITAGE *strategies*

Wellesley, Massachusetts *Design Guidelines*

Location: Wellesley, Massachusetts

Client: Town of Wellesley

HS Project Manager and Historical Architect: Peter Benton

Principal Preservation Planner: Elizabeth Watson



The Town of Wellesley is a mature suburban community located in the hills southwest of Boston. First settled in the 1630's, Wellesley became an independent town in 1881. Since then, Wellesley has developed as a predominantly residential community with neighborhoods of distinctive character from all periods of late nineteenth and early, mid, and late twentieth century growth.

Wellesley's Historic Preservation Design Guidelines were prepared to assist property owners in the planning and design of changes to historic residences within the Town's Local Historic Districts. They also guide the Town's Historic District Commission in the review and approval process.

More broadly, however, the Design Guidelines are a community-wide resource to inform decision making about changes to historic residences in historic neighborhoods from all eras throughout Wellesley.



HERITAGE *strategies*

Old Wethersfield *Community Master Plan*

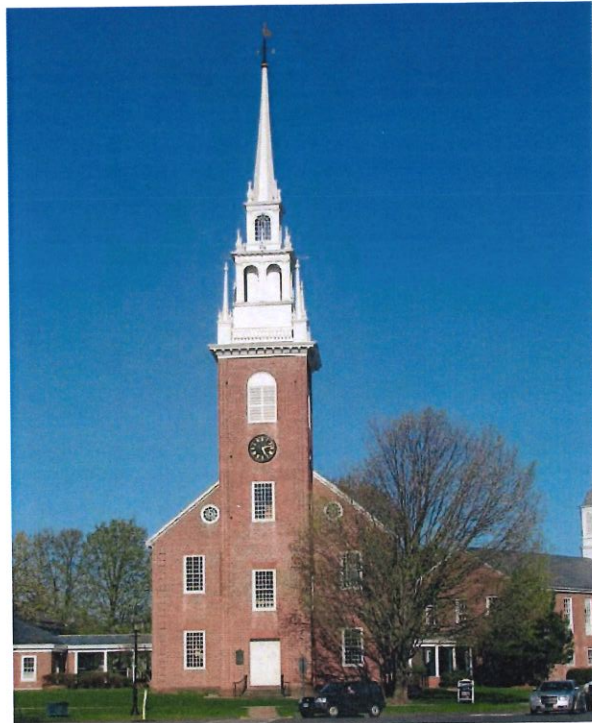
Location: Wethersfield, Connecticut
Client: Town of Wethersfield
Prime Consultant: John Milner Associates, Inc.
JMA Project Director: Peter Benton

Wethersfield was the first permanent English settlement in Connecticut, established in 1635, and was one of the first three towns to be developed along the Connecticut River. With landscape and built resources representing the seventeenth to the twenty-first centuries, it forms an important continuum of architectural, socioeconomic, and cultural history.

Today, Old Wethersfield is Connecticut's largest historic district. Its history is communicated to visitors and residents through its historic buildings and neighborhood landscapes, house museums and exhibits, and over a century of strong community preservation traditions.

Wethersfield was designated a Preserve America community in 2005. The master plan for Old Wethersfield supported ongoing preservation programs, strengthened business uses in the village center, outlined potential streetscape improvements, introduced a coordinated wayfinding system, and recommended a comprehensive program for community interpretation.

First Congregational Church (right).



Historic business in the village center.

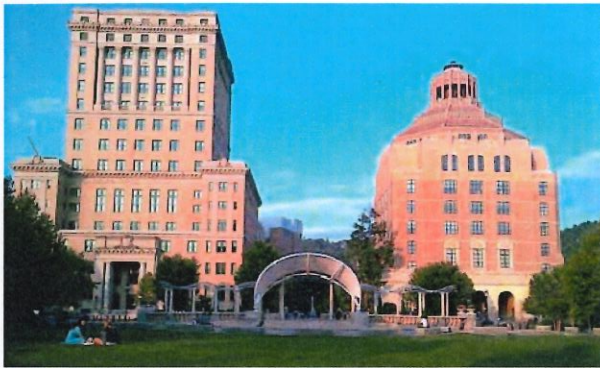


Village cemetery.

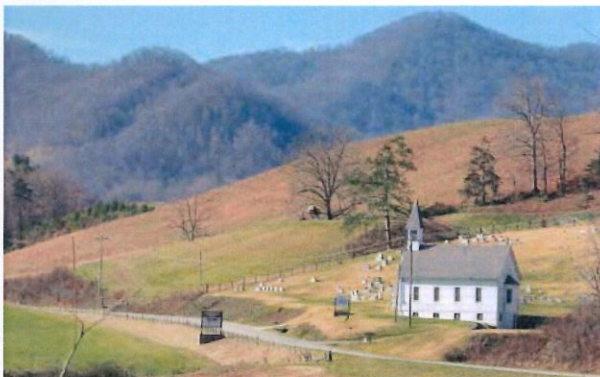
HERITAGE *strategies*

Historic Preservation Master Plan for Asheville and Buncombe County, North Carolina

Client: Historic Resources Commission of Asheville and Buncombe County
Prime Consultant: Heritage Strategies, LLC



Since the establishment of the federal tax credit for historic rehabilitation in 1976, Asheville, NC, has seen millions of dollars of investment in the historic buildings of its early 20th-century downtown and many historic neighborhoods. The program expanded rapidly in the nearly twenty years of the companion state tax credit (recently ended), including a revitalized industrial district devoted to the arts and a funky streetcar neighborhood. The city is one of the nation's great historic preservation success stories – for North Carolina is one of the top-ranked users of the credit, and Asheville for many years was the top beneficiary in the state. Leaders of the 1980's and 1990's were highly supportive.



The joint Historic Resources Commission of Asheville and Buncombe County was established in 1979 and followed the state's legislative guidelines for providing historic preservation to both city and county. Until 2015, however, it had never had a historic preservation plan. With a new generation of leaders and owners, and the region's new attractiveness to both intensive development and tourism, the Commission knew it was time for thinking anew.



Heritage Strategies helped the Commission identify issues and strategies addressing best historic preservation practices, focusing on residential neighborhoods, multiple business districts, and the county's beautiful farm landscape. The plan encourages the Commission to focus on goals for preservation across the city and county, beyond designated historic districts. It also challenges both Commission and stakeholders to build a new generation of historic preservation supporters through public outreach, collaboration with tourism interests, and interpreting Asheville's stories through historic buildings.

HERITAGE *strategies*

Jefferson City, Missouri *Historic Preservation Plan*

Location: Missouri's State Capital

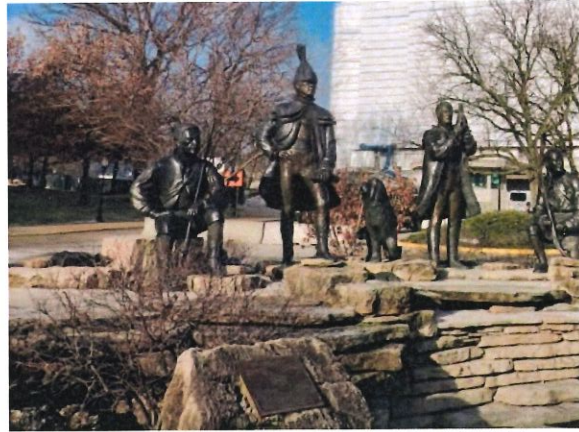
Client: City of Jefferson

Prime Consultant: Heritage Strategies, LLC (A. Elizabeth Watson, FAICP, Project Leader)

Jefferson City, settled on high limestone banks of the Missouri River less than two decades after the Lewis & Clark Expedition poled their way upstream to investigate the great Louisiana Purchase on behalf of President Thomas Jefferson, became Missouri's state capital in 1821. Today, its splendid two-century downtown provides a setting for many community gatherings and events as well as hosting thousands of visitors to the State Capitol, the Governor's Mansion, the Missouri State Penitentiary (the oldest prison west of the Mississippi River, 1836 to 2004), and other city attractions. Heritage Strategies provided a historic preservation plan that supports further strengthening of the city's facade grant program, tackling blight in some neighborhoods and recognizing the historic qualities of others, and focusing on additional development of heritage tourism opportunities.



The Second Empire-style Missouri Governor's Mansion was built in 1871.



The Corps of Discovery Monument by sculptor Sabra Tull Meyer, dedicated in 2008, commemorates the 1803-06 Lewis & Clark Expedition.



Jefferson City has some especially fine examples of residential neighborhoods built in the 1930s – when other communities were too poor to build extensively after the Depression set in, the city's economy was protected by the growth of the state government. Brick is a character-defining material across the entire city.

HERITAGE *strategies*

Northampton County, Pennsylvania *Historic and Cultural Assets Plan*

Location: Northampton County, Pennsylvania

Client: Northampton County Department of Community and Economic Development,
Lehigh Valley Planning Commission

Prime Consultant: Heritage Strategies, LLC



Northampton County includes the cities of Bethlehem and Easton with their historic urban contexts (left), charming late 19th century boroughs (center), and suburban and rural suburban townships (right).

Located in Pennsylvania's Lehigh Valley, Northampton County has a long history of growth and development and is currently experiencing significant suburban growth pressure. Community character is central to quality of life in its municipalities. Northampton County has prepared a *Historic and Cultural Assets Plan* to address the role of local history as a component of community character and to identify ways it can be recognized, strengthened, and enhanced through public and private action.

The Historic and Cultural Assets Plan takes a landscape approach – examining the patterns and character defining features of the region's communities as an interconnected whole, rather than as isolated elements. The plan seeks ways to accommodate growth and change while preserving and enhancing the best aspects of the places in which residents live. Through discussions with stakeholders, three broad concepts were developed as the core approach to the plan and are reflected in the plan's vision, goals, and actions:

- Recognize the central role that historic and cultural assets play in regional identity and the identity of individual communities;
- Engage, support, and find common ground with a wide variety of public and private sector partners to preserve, conserve, or revitalize assets;
- Incorporate historic preservation concepts and methodologies into long term growth management strategies and municipal processes.



Northampton County's historic 19th century agricultural landscape is central to community identity in townships.

HERITAGE *strategies*

Montana's Copperway

Regional Historic Preservation Plan and Heritage Tourism Strategy

Location: Butte and Anaconda, Montana

Client: Butte-Silver Bow County

Prime Consultant: Heritage Strategies, LLC



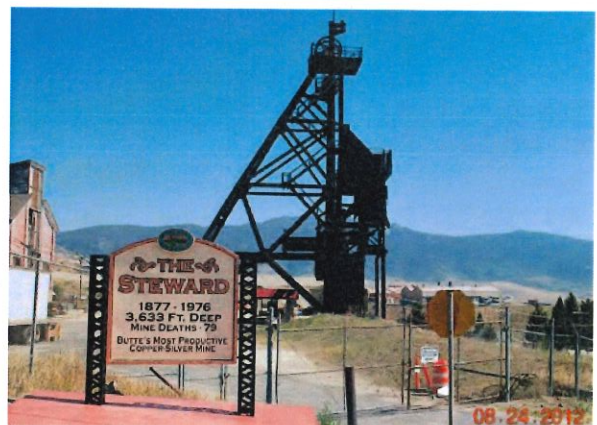
Historic Uptown Butte

In 1992, Butte and Anaconda, Montana – copper mining and smelting towns respectively – entered into a programmatic agreement with the Montana SHPO, the EPA, and the Advisory Council on Historic Preservation to preserve the nation's largest National Historic Landmark district. Cleanup of copper-mining toxins would require decades, in what is also the nation's largest Superfund site. The agreement was based on a plan centered on the region's industrial history, classifying historic resources for treatment according to their potential for supporting interpretive themes. Economic development in the distressed communities was a major goal.

Heritage Strategies, LLC, was asked to update the plan to capitalize on two decades of public and private investment in imaginative historic preservation and innovative cleanup. In an era when towns with high-quality historic resources, strong business communities, walkable neighborhoods, and great outdoor recreation can capitalize on heritage tourism, Butte and Anaconda have many opportunities for economic growth. The new plan provides strategies for collaborative heritage tourism and smart, redoubled historic preservation.



Façade and painted sign restoration



One of nine preserved headframes, the Steward, now serves to interpret Butte's mining history

HERITAGE *strategies*

San Antonio, Texas

Mission Historic District and World Heritage Site Design Guidelines

Location: San Antonio, Texas

Client: City of San Antonio, Office of Historic Preservation

HS Project Manager and Historical Architect: Peter Benton

Undertaken in Collaboration with: The Lakota Group, Chicago, IL



Four eighteenth century Spanish Missions are sited along the San Antonio River and are an international visitor destination.

Located along the San Antonio River south of center city, San Antonio's Mission Historic District has been designated a World Heritage Site. The four eighteenth century Spanish Missions located there are managed by the National Park Service and welcome thousands of visitors each year.

The design guidelines for the district prepared by Heritage Strategies and The Lakota Group help preserve and rehabilitate historic early twentieth century residential neighborhoods and commercial corridors in the vicinity of the Missions so they provide an appropriate level of preservation and design quality for a World Heritage Site.

Significant new development is expected within the district in coming years, and the design guidelines address new construction compatibility with the historic Missions and the ecologically restored river landscape.

Because of the range of conditions within the historic district customized chapters were developed for each sub-area.



In addition to the Missions, the historic district includes a wide variety of historic early twentieth century buildings.

HERITAGE *strategies*

Niagara Falls National Heritage Area *Management Plan*

Location: Niagara County, New York

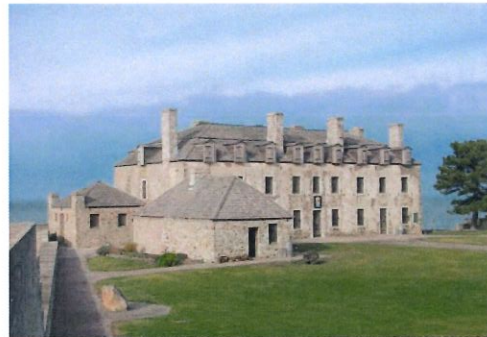
Client: National Park Service

Prime Consultant: John Milner Associates, Inc.

Managing Sub-consultant: Heritage Strategies, LLC

The Niagara Falls National Heritage Area encompasses the City of Niagara Falls and communities of Lewiston and Youngstown to the north. Designated by Congress in 2008, the heritage area focuses upon interpretation of the natural, cultural, and historic resources of the region. The natural phenomenon of Niagara Falls and the Niagara River Gorge, tourism and recreation, power and industry, and the borderland with Canada are key interpretive subjects.

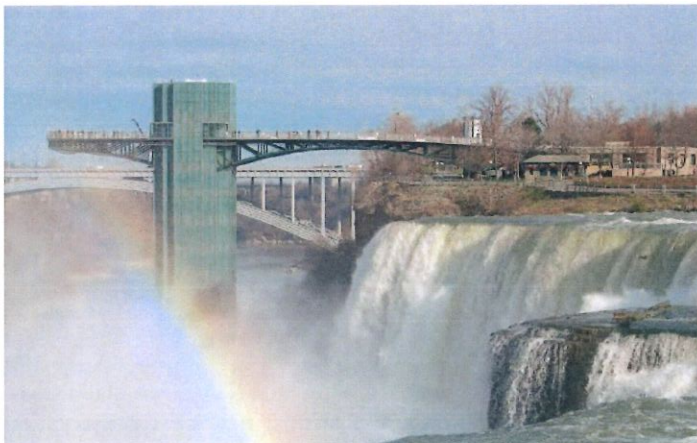
Heritage Strategies was retained to manage preparation of a management plan for the heritage area as stipulated by its enabling legislation, including compliance with NEPA requirements. Over 6 million individuals visit the Falls each year. A primary goal of the heritage area is to enhance visitor experience in ways that support revitalization of the City of Niagara Falls and strengthen businesses in the river communities to the north. The heritage area will also foster wider regional cooperation and programming by connecting with related historic sites throughout Niagara and Erie Counties and through collaborative programming with organizations and sites in Canada.



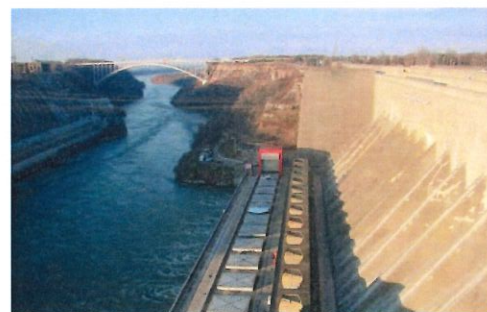
Fort Niagara



Lewiston



View of Niagara Falls



Power Vista

**CONCORD COMMUNITY-WIDE HISTORIC PRESERVATION PLAN
PRICE QUOTATION FORM**

Attachment B

This Quotation MUST be signed by an authorized individual(s). The quote must be signed as follows: 1) if the quoter is an individual by her/him personally; 2) if the quoter is a partnership by the name of the partnership, followed by the signature of each general partner; and 3) if the quoter is a corporation, by the authorized officer, whose signature must be attested to by the Clerk/Secretary of the corporation and the corporate seal affixed.

By signing this Quote Form, the quoter confirms compliance with applicable state and federal employment laws or regulations including Workers Compensation Insurance as required by M.G.L. Chapter 152.

The undersigned certifies under penalties of perjury that this quotation has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

Pursuant to M.G.L.c62C 5549A, I certify under penalties of perjury that, to the best of my knowledge and belief, I am in compliance with all laws of the Commonwealth relating to taxes, reporting of employees and contractors and withholding and remitting child support..

Business Name: HERITAGE STRATEGIES LLC
Business Address: PO Box 277
City/State/Zip: BIRCHRUNVILLE, PA 19421
Telephone Number: 484-354-2385
Email: pbenton@heritagestrategies.com
Signed: Peter C Benton
Date: SEPTEMBER 13, 2023
Printed Name and Title: PIETER C. BENTON, VICE PRESIDENT/
PRINCIPAL

PRICE QUOTATION FORM(continued)

The VENDOR hereby pledges to deliver the complete scope of services required, for the rates and charges shown below:

Cost to complete the project:

Phase I:	<u>\$14,500</u>
Phase II:	<u>8,900</u>
Phase III:	<u>20,600</u>
Phase IV:	<u>4,400</u>
TOTAL COST:	<u>\$48,400</u> (not to exceed \$50,000)

Written Amount FORTY-EIGHT THOUSAND \$48,400
FOUR HUNDRED DOLLARS

In the case of discrepancy between the written amount and the figure, the written amount will prevail.

I, HELENA BENTON, CLERK-SECRETARY OF HERITAGE STRATEGIES, LLC CERTIFY THAT PETER C. BENTON IS VICE PRESIDENT OF HERITAGE STRATEGIES AND THAT HIS SIGNATURE TO THIS QUOTATION IS GENUINE,

Helena A. Benton
CLERK-SECRETARY

DATE OF INCORPORATION: JANUARY 27, 2009
HERITAGE STRATEGIES DOES NOT HAVE A CORPORATE SEAL - NOT REQUIRED IN PENNSYLVANIA.

9/13/2023

Attachment C

CERTIFICATE OF NON-COLLUSION

The undersigned certifies under the penalties of perjury that this quotation has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity or group of individuals.

Signature of Individual Signing Response:

Patricia C. Baker

Name of Business:

HERITAGE STRATEGIES LLC

Date:

SEPTEMBER 13, 2023

STATEMENT OF STATE TAX COMPLIANCE

Attachment D

Pursuant to MGL Chapter 62C, S. 49A, as amended, I PETER C BENTON
VICE PRESIDENT / PRINCIPAL
(NAME & TITLE)

Authorized signatory for HERITAGE STRATEGIES LLC
(CONTRACTING PARTY)

Whose principal place of business is at PO BOX 277
BIRCHRUNVILLE, PA 19421
(ADDRESS)

Do hereby certify under the pains and penalties of perjury that _____

HERITAGE STRATEGIES LLC has complied with all laws of
(CONTRACTING PARTY)

the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

CONTRACTING PARTY'S SOCIAL

SECURITY OR FEDERAL I.D. NUMBER

26-4124670

Peter C Benton

(AUTHORIZED SIGNATURE)

SEPTEMBER 13, 2023 (DATE)

Attachment E

ADDENDA ACKNOWLEDGEMENT FORM

Vendor Name: HERITAGE STRATEGIES LLC

Vendor Address PO BOX 277

BIRCHRUNVILLE PA 19421

Telephone Number: 484-354-2385

Email: pblanton@heritagestrategies.com

This bid includes addenda number (s) 0

Signature: 

Title: VICE PRESIDENT / PRINCIPAL

Date: SEPTEMBER 13, 2023