

# Temple Ohabei Shalom

1187 Beacon Street,  
Brookline, MA 02446

## **REQUEST FOR PROPOSALS**

### **TIMELINE**

**Site visit:** October 6, 2023

**Proposals due:** October 27, 2023

**Notification of award:** November 17, 2023

**Project must be completed by:** June 30, 2024

Please submit completed electronic proposals to:  
[executivedirector@ohabei.org](mailto:executivedirector@ohabei.org)

Late or incomplete proposals will not be considered.

Any questions during the proposal period may be addressed to:

Shari Churwin  
Executive Director of Education & Administration  
Temple Ohabei Shalom  
Email: [executivedirector@ohabei.org](mailto:executivedirector@ohabei.org)  
Phone: (617) 277-6610

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### REQUEST FOR PROPOSALS

Temple Ohabei Shalom (TOS) is seeking proposals for professional services to complete a conditions and structural integrity assessment of the sanctuary building exterior and interior and to develop a prioritized master plan for future repair and maintenance recommendations. The Byzantine-Revival style building was designed by noted architect Clarence Blackall from the Boston architectural firm Blackall, Clapp, and Whittemore. It was listed in the National Register of Historic Places in 1985.

TOS seeks proposals from qualified individuals and firms to provide the following for the temple complex's sanctuary building:

- Perform an exterior building conditions and structural integrity assessment with special emphasis on:
  - Dome
  - Roof (potential water penetration)
  - Flashing
  - Masonry
  - Cast stone/concrete and limestone siding
  - Multiple entrances
  - Exterior stairs (Beacon Street and Kent Street)
- Develop CAD plans and elevations to show existing conditions
- Develop a prioritized master plan, with cost estimates, that will focus on pressing and future preservation needs of the building
- Recommended cyclical maintenance plan
- Prepare bid-ready documents for highest priority repairs
- Develop conceptual plans for secondary repairs
- Compose a final report

The total project fee has been established at \$60,000. This includes all labor, materials, supplies, and out-of-pocket expenditures and travel time necessary to complete the scope of work. This also includes time for meetings with the representatives of TOS.

All work specified must comply with the Secretary of the Interior's Standards for the Treatment of Historic Properties. This property is designated as a National Register District (1985), a National Register MRA (1985), and holds a Preservation Restriction (1998); it is considered a "historic resource" within two historic districts: the Beacon Street Historic District and the Brookline Multiple Resource Area. It is designated as an Historic Property in Brookline (Beacon Street NRD). This project has received a grant from the Massachusetts Preservation Projects Fund, through the Massachusetts Historical Commission.

The purpose of this request is to obtain statements of qualifications and proposals from interested firms. Proposals shall be evaluated on the basis of previous experience with similar types of projects, demonstrated ability to perform the work within the proposed timeline and budget, and references.

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Potential bidders will have the opportunity to see the site and discuss the project requirements on Friday, October 6, 2023, at 10:00 a.m. The synagogue will accept questions received in writing before the proposal due date and will send the answer in writing to all the firms that attended the site visit.

Proposals are due on Friday, October 27, 2023, by 5:00 p.m. TOS is an Equal Opportunity/Affirmative Action Employer. Please contact Shari Churwin, Executive Director of Education & Administration, by email ([executivedirector@ohabei.org](mailto:executivedirector@ohabei.org)) or by phone (617-277-6610) for further information.

TOS reserves the right to reject any and all proposals.

### **Project Area**

The project area includes the architectural exterior and interior of TOS's historic sanctuary building.

### **Background**

Temple Ohabei Shalom (TOS), "Lovers of Peace," has been at the center of New England Judaism since its founding in 1842 as the first Jewish congregation in Massachusetts (MA). As an affiliate of the Union for Reform Judaism, TOS encourages membership of people from all paths of Judaism. Starting in 1851, the congregation met in a downtown Boston location. With the burgeoning Jewish community in Brookline in the 1920s, TOS decided to purchase the current property in 1921. The first building in the complex was constructed in 1925 and the main building and its sanctuary was completed in 1928. TOS was designed as a synagogue with a Byzantine-Revival style edifice and magnificent sanctuary modeled on architectural themes from the Hagia Sophia in Istanbul, Turkey, and the Great Synagogue of Florence, Italy. It was designed by the Boston architectural firm Blackall, Clapp, and Whittemore. Defined as a "Temple Center," TOS is a multibuilding synagogue complex. Its three connected buildings include the historic sanctuary (with the distinctive dome), an administration wing, and the education building.

Along with its historical significance as the home of the state's oldest Jewish congregation, TOS's architectural structure is a prominent Greater Boston religious and architectural landmark. TOS occupies a full city block on Beacon Street, the major thoroughfare of Brookline, MA, and is across the street from a busy Massachusetts Bay Transportation Authority (MBTA) public transit station (Green Line C branch). The sanctuary's dome rises above the neighborhood trees and can be seen from as far away as Fenway Park and Coolidge Corner.

TOS's main historic building consists of the sanctuary (main level) and a large function room and kitchen in the basement. Much of the current physical structure of the sanctuary building is nearly 100 years old. Throughout the life of the building, TOS has faced many conservation and preservation challenges. The exterior copper dome was replaced in 1999. Currently, the sanctuary building has multiple physical issues, including the following: 1) water penetration of the roof, which has caused extensive water damage to and deterioration of the hand-painted plaster of the highly decorated interior dome; 2) deterioration of the exterior stairs,

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which has caused water to leak into the basement kitchen (located directly under the stairs); and 3) cast stone/concrete and limestone deterioration on the exterior edifice.

Exterior damage results in interior deterioration. For example, leaks in the roof caused extensive water damage in the hand-painted plaster of the interior, including the highly decorated interior dome. TOS attempted to fix the leak in 2019 by replacing all four flat roofs and installing drainage. However, continued water leaks means that the 2019 repair was either unsuccessful or incomplete.

### **Project Objectives**

The main objective of this project is to develop a master plan, cyclical maintenance plan, and final report based on the condition and structural integrity assessments to guide near-term and future preservation of the sanctuary building (see “Scope of Work” and “Final Products,” below, for details).

### **Available Resources**

The following reports are available for review and use by the awardee:

- 2013 CBI Structural Condition Report
- 1980 Massachusetts Historic Commission Registry Index
- Photographic Documentation

### **Scope of Work**

- Perform an exterior building conditions and structural integrity assessment, with particular emphasis on the following:
  - Dome
  - Roof (potential water penetration)
  - Flashing
  - Masonry
  - Cast stone/concrete and limestone siding
  - Multiple entrances
  - Exterior stairs (Beacon Street and Kent Street)
- Develop CAD plans and elevations to show existing conditions
- Conduct a review of current building codes
- Develop a prioritized master plan with cost estimates of the repairs/restoration work
  - Focus on necessary restoration to the building
  - Recommend the repairs according to immediate (0–3 years), short-term (3–5 years), and long-term needs (5+ years)
- Develop a cyclical maintenance plan
  - Create a prioritized list of recurring maintenance procedures for the building to prevent future damage to the integrity of the structure with corresponding time intervals
  - Include associated cyclical maintenance costs for these procedures
- Meet with MHC staff and the Local Project Coordinator for review of the Assessment at 90% completion
- Prepare bid-ready documents for highest priority repairs
- Develop conceptual plans for secondary repairs

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### **Final Products**

The final report shall include:

1. An executive summary
2. Methodology
3. Description of the project
4. Conditions assessment
5. Cost estimates
6. Conceptual plans
7. Bid-ready documents as appropriate
8. A cyclical maintenance plan
9. Bibliography
10. Photographs
  - a. Photographs used for documentation are to be 4" x 6" in size (color) and are to have labels that include building name, location of subject, and date.
  - b. Consultant shall also provide two photos of the installed MHC project sign as well as two 8" x 10" (from two different angles) and one 4" x 6" color record shot photos of the structure.
  - c. Photographs are to be printed according to the MHC Guidelines, which will be provided to the successful proposer.

The final report shall contain printed versions of all drawings provided electronically, sized 11" x 17". An electronic copy of all drawings shall be submitted in AutoCAD DWG format.

Required copies of the final include:

1. Four (4) hard copies of the final report shall be provided to TOS.
2. Two (2) additional copies shall be provided to the MHC.
3. One (1) electronic copy of the final report shall be submitted in PDF format to TOS.
4. Two (2) additional electronic copies shall be provided to the MHC.

PLEASE NOTE: All contract work must be completed by June 30, 2024.

### **Proposal Requirements**

#### **QUALIFICATIONS**

The consultant team must meet the following minimum criteria:

- a. The Principal of the team shall have demonstrated experience in feasibility studies, condition assessments, and preservation plans for historic structures, and have a bachelor's degree in historic preservation, architecture, architectural history, history, planning, or a closely related field with at least two years full-time experience; or, master's degree in historic preservation, architectural history, history, planning, or a closely related field.

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- b. The team shall include a Registered Professional Architect, with demonstrated experience in the evaluation of historic structures as well as a Registered Structural Engineer. All Team members shall be listed in the proposal.
- c. The Principal of the team shall have previous experience working on at least three buildings on the State Register of Historic Places.

### PROPOSAL SUBMISSION

- a. All proposals must be received by TOS at or before 5:00 p.m. on Friday, October 27 2023.
- b. Each proposer must submit an electronic PDF copy of their proposal via email to [executivedirector@ohabei.org](mailto:executivedirector@ohabei.org).
- c. Each proposal must be clearly marked in the email subject line as “Proposal—Temple Ohabei Shalom.” The submission of the proposal will be construed to mean that the proposer is fully informed as to the extent and character of the supplies, materials, or equipment required and a representation that the proposer can furnish the supplies, materials, or equipment satisfactorily in complete compliance with the specifications.

### PROPOSAL REQUIREMENTS

The proposal must include the following information. Please see “Criteria Rankings” for specifics on how each proposal component will be graded by the TOS Evaluation Team:

1. Qualifications Statement, including:
  - a. A summary of the applicant’s professional work experience attesting to their capacity to perform the required work
    - i. Please provide summary examples of at least two (2) relevant projects completed by the project team, including work on buildings of this period;
    - ii. Please provide summary examples of applicant’s work on at least three (3) buildings listed in the State Register of Historic Places in the last five (5) years.
    - iii. Please demonstrate the project team’s knowledge of governmental requirements for historic properties.
    - iv. Please demonstrate the project team’s understanding of building code requirements and issues.
  - b. The names, titles, and highest degrees of all of the team members who will be assigned to this project.
2. Project Description: A description of the proposer’s approach to this project, including the project phases, goals, tasks, and products of each phase, a demonstrated understanding of potential issues, the scope of work, and the completion deadline, and the proposer’s expectations of assistance and services from TOS.
3. Work Plan: A work plan and timetable for accomplishing each task described in the “Project Description.”
4. Attachments:
  - a. Current resumes of all team members who will be assigned to this project.
  - b. Work Samples: Please submit two (2) work samples from the projects mentioned in “Past Experience,” with at least one (1) of the work samples from a building listed in the State Register of Historic Places.

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- c. A client reference list, with names, mailing addresses, email addresses, and telephone numbers of specific clients for whom the consultant performed similar services within the past five (5) years.
- d. Policies: Please submit a certificate of professional liability insurance that will be maintained throughout this project.
- e. Signed Forms:
  - i. Proposal Signature Form
  - ii. Certificate of Non-Collusion
  - iii. Certificate of Vote of Corporation, as applicable.

*Any proposal that fails to include all of the above information will be rejected as unresponsive, and will not be afforded a complete review by the evaluation team.*

### **METHOD OF SELECTION**

The TOS Evaluation Team will use the criteria described below to evaluate proposals and confirm that Minimum Evaluation Criteria are met. The Evaluation Team shall review and rank each proposal that meets the Minimum Evaluation Criteria according to the Comparative Evaluation Criteria listed below. The top three proposers will be invited to interview with the Evaluation Team. The Evaluation Team will then select the responsive and responsible architect or consultant(s) submitting the most advantageous proposal taking into consideration all quality requirements and the comparative criteria set forth in this RFP. Top-ranked proposals will also be reviewed by the MHC before an award can be made. Once both parties approve, the awarded applicant will be notified and work is to commence immediately.

### **Minimum Evaluation Criteria**

The Selection Committee shall first review each technical proposal to ascertain whether or not the following minimum criteria have been met:

1. The proposal includes all of the items for a complete proposal.
2. The proposer meets the minimum qualifications as outlined above, and demonstrates understanding of the tasks to be performed and deliverables to be achieved.

### **Comparative Evaluation Criteria:**

The following criteria will be used to evaluate each proposal:

1. Prior experience with projects similar to the MHC Preservation Projects Funds projects.
2. Knowledge of governmental requirements for historic properties, including both regulatory requirements and eligibility for public funding.
3. Demonstrated understanding of building code requirements and issues.
4. Client references.
5. Professional qualifications and experience.
6. Consultant qualifications and experience.
7. Project approach and understanding of issues.
8. Capacity to undertake and complete the project in a timely manner.

All responsive proposals will have their Comparative Evaluation Criteria judged by the following rankings. The TOS Evaluation Team will rank each proposal as one of the following:

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- a. **Highly Advantageous (HA)**—the proposal fully meets and significantly exceeds the standards of the specific criterion.
- b. **Advantageous (A)**—the proposal fully satisfies the standards of the specific criterion.
- c. **Not Advantageous (NA)**—the proposal does not fully meet the standards of the specific criterion, is incomplete, unclear, or both.

### CRITERIA RANKINGS

#### 1. **Quality and Depth of Project Experience:**

- **Highly Advantageous**—The project proposal demonstrates superior experience in providing services related to TOS’s requirements. The project proposal demonstrates a wide depth of experience with similar projects, and prior experience with municipally, privately, or MHC-funded not-to-exceed or fixed-fee contracts. Project work samples are of outstanding quality in content and technical presentation.
- **Advantageous**—The project proposal demonstrates solid experience in providing services related to TOS’s requirements. The project proposal demonstrates a good depth of experience with similar projects, and prior experience with municipally or privately funded not-to-exceed or fixed-fee contracts. Project work samples are of good quality in content and technical presentation.
- **Not Advantageous**—The proposer has limited experience in providing services related to TOS’s requirements or with similar projects, and prior experience with public or private not-to-exceed or fixed fee contracts. Project work samples minimally meet current standards for content and technical presentation.

#### 2. **Prior Experience with Comparable Projects:**

- **Highly Advantageous**—Superior experience with re-use and restoration of historic properties with a significant number (5 or more) of previous related projects. Prior work on historic religious structures is a plus.
- **Advantageous**—Solid experience (3–4 projects) with historic restoration/renovation projects with similar requirements.
- **Not Advantageous**—Limited (1–2 projects) or no experience with historic restoration projects.

#### 3. **Knowledge of Government Requirements:**

- **Highly Advantageous** - Superior experience with and knowledge of government requirements for historic properties and public funding. Demonstrates understanding of issues relative to this building, project, and potential solutions.
- **Advantageous**—Solid experience with and knowledge of government requirements for historic properties and public funding.
- **Not Advantageous**—Limited or no experience with and knowledge of government requirements for historic properties and public funding.

#### 4. **Understanding of Building Code Issues:**



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- **Highly Advantageous**—Superior experience with building code issues, specifically with historic building spaces. Demonstrates understanding of issues relative to this building, project, and potential solutions.
- **Advantageous**—Solid experience with accessibility and building code requirements.
- **Not Advantageous**—Limited or no experience with accessibility and building code requirements.

### 5. Client References:

- **Highly Advantageous**—All references contacted spoke favorably of the work performed by the proposer and would use them again for a similar project without hesitation.
- **Advantageous**—The great majority of references spoke favorably of the work performed by the proposer and would use them again for a similar project without hesitation.
- **Not Advantageous**—One reference stated that there had been significant difficulties with the proposer's ability to deliver the contracted services and deliverables.

### 6. Outside Consultant Qualifications and Experience (if applicable):

- **Highly Advantageous**—The applicant uses outside consultants with superior experience with re-use and restoration of historic properties.
- **Advantageous**—The applicant uses consultants with solid experience with historic restoration/renovation projects with similar requirements.
- **Not Advantageous**—The applicant uses consultants with limited or no experience with historic restoration projects.

### 7. Project Approach and Understanding of Issues:

- **Highly Advantageous**—Clear and logical approach to project, including specific project plan and goals, interim review points, identification of potential significant issues and alternative options, and demonstrated understanding of project scope.
- **Advantageous**—Demonstrated approach to project with some knowledge of issues and alternatives, and clear understanding of project scope
- **Not Advantageous**—Unclear understanding of project scope, unrealistic project plan or unclear understanding of issues.

### 8. Capacity to Complete Project in Timely Manner:

- **Highly Advantageous**—Proposal commits specific team members and availability. It also specifies a project time frame, with realistic deadlines to result in a quality product. Demonstrated ability to plan and deliver a product in other referenced projects. The Evaluation Team is completely convinced the proposer can complete the project in a superior manner.
- **Advantageous**—Specific team members identified and detailed project plan specified. Evaluation Team finds proposal reflects that proposer is able to complete the project in an adequate manner.

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- **Not Advantageous**—Proposal lacks specific timing and commitment to complete project. Evaluation Team believes proposer may be able to meet time frame.

### **Interviews**

After reviewing the proposals, the Evaluation Team will invite the top three proposers to interview with them for the purpose of further evaluation. The purpose of the interviews will be to enhance TOS's understanding of the written proposal and communication skills of the proposer. The results of the interviews can be factored into the selection decision.

### **Project Fee**

TOS has established a budget of \$60,000 for the Scope of Services described herein. Fees shown shall include all costs and expenses (e.g., copying, mileage, photographs, postage, etc.) to complete the scope of work defined in this RFP. The Evaluation Team will select the most overall advantageous proposal. Contract award recommendation is subject to review and approval by the MHC.

### **Addenda**

If any changes are made to this RFP, an addendum will be sent via email to all proposers on record as having picked up the RFP. All addenda must be acknowledged in the proposal. Failure to do so may result in automatic rejection of a proposal.

### **Modifications by Proposer**

A proposer may correct, modify, or withdraw a proposal by notice via email received by TOS prior to the time and date by which the proposals are due. Proposal modifications must be submitted via email to [executivedirector@ohabei.org](mailto:executivedirector@ohabei.org) with the subject line clearly labeled "Proposal Modification No. \_\_\_, [Proposal Requirement Heading]." Each modification must be numbered in sequence, and must reference the original RFP.