SOLICITATION FOR:
Historic Preservation Architectural Services for
The Old Manse Welcome Center

RELEASED:
11/30/2016

DUE BY:
12/22/2016 at 5:00pm EST

DELIVER TO:
The Trustees
200 High Street
Boston, MA 02118
Attn: Elizabeth Keary Soule
Project Manager
REQUEST FOR PROPOSALS
FOR
Old Manse Welcome Center

SECTION 1.0
GENERAL INFORMATION ON BID PROCESS

1.1 INVITATION: It is the intention of the Trustees to solicit proposals for Historic Preservation Architectural Design through Construction Administration Services for the proposed Welcome Center project at their Old Manse property in Concord, MA.

The Trustees makes this Request for Proposals (hereinafter referred to as the RFP) in order to select a qualified Preservation Architect (hereinafter referred to as the Architect) for providing Historic Preservation Architectural Design Services for the proposed Old Manse Welcome Center (hereinafter called the Project), a new building in the location of a historic barn existing on the property between 1774 and 1924. The Project is generally described in the “Scope of Services” (SECTION 2.0), contained within this RFP, including descriptions of roles, responsibilities and relationship of the Architect and other parties involved in the Project.

1.2 PRE-PROPOSAL SITE VISIT: A pre-proposal site walk will be held Friday, December 16th at the Old Manse 269 Monument Street Concord, MA 01742. All potential Architects are encouraged to attend this site visit.

1.3 PROPOSAL DUE DATE and LOCATION: The Architect shall submit one (1) printed proposal and a digital copy as a single PDF file on a flash drive to the Trustees, labeled:

Request for Proposals for:
Old Manse Welcome Center
200 High Street
Boston, MA 02118

The submittal shall be made at or before 5:00pm EST, December 22nd, 2016.

NOTE: Late proposals will not be accepted.

1.4 PROPOSAL FORMAT: The Architect shall provide the appropriate information in sufficient detail to demonstrate that the evaluation criteria has been satisfied as specified in Section 1.5 “EVALUATION OF PROPOSALS”.

To allow for easier comparison of proposals during evaluation, proposals should contain the following sections and be arranged in consecutive order:
1. Executive Summary - The Executive Summary should include a clear statement of the Architect’s understanding of the RFP including a brief summary of the Scope of Work. Include, at a minimum, an outline of the contents of the proposal and a summary of the proposed services.

2. Scope of Services - Describe in detail how services will be provided. Include a detailed listing and description of tasks and deliverables.

3. Experience and Capacity - Describe background and related experience demonstrating ability to provide required services. Indicate if company expansion is required to provide service. Describe specific experience producing design services for the following:
   - work that meets the Secretary of Interior’s Standards for the Treatment of Historic Properties
   - federally funded projects
   - new construction at a National Landmark property

4. References - List references from contracts similar in size and scope.

5. Personnel Listing - Show involved individuals with resumes and specific applicable experience.

6. Cost/Fees - Indicate proposed cost of service including a description of how costs were determined; hourly rates; break down into discrete tasks and project phases; list proposed payment billing schedule; if applicable, list charges per classification of employee.

1.5 EVALUATION OF PROPOSALS AND SELECTION OF ARCHITECT: Proposals will be reviewed by an Evaluation Panel made up of representatives of the Trustees’ Old Manse Welcome Center team. The Evaluation Panel may select a "short list" of qualified Architects who will be formally interviewed as part of the final selection, as deemed necessary by the Trustees. Evaluations will be based on the required criteria listed in Section 1.4 “PROPOSAL FORMAT”, and the following:

   a. Quality, thoroughness, and clarity of proposal.
   b. Qualifications and experience of staff (includes a review of references) working on new construction at historic properties and, in particular, National Landmark properties.
   c. Contracted Architect must not be debarred or suspended from doing business with the federal government in compliance with the Advisory Council on Historic Preservation regulations Subpart C of 2 CFR Parts 180 and 3369.
   d. How well the Scope of Services offered meets project objectives.
   e. Organization and management approach and involvement for a successful project.
   f. Small businesses, minority-owned firms, and women’s business enterprises participation.
   g. Cost of services proposed.
   h. Insurance coverage as defined for the services.

A formal Interview will be requested of the “short list” Architect/s. The Trustees’ Project Manager will schedule and arrange for interviews. Proposers are asked to reserve Friday, January 18th, 9am – 5pm for a potential interview. Architects who will be invited for interviews will be notified by the end of day Thursday, January 5th.
1.6 **SCHEDULE:** The following is a listing of key Proposal milestones:

- **RFP Issued:** 11/30/2016
- **Deadline for Submitting Questions to RFP:** 12/13/2016 – 11:00am EST
- **Proposals Due:** 12/22/2016 – 5:00pm
- **Anticipated Contract Award:** 2/3/2017
- **Services Commence:** 2/14/2017

1.7 **CONTRACT:** The contracting parties will be the Trustees and the Architect selected to provide the services as described herein. The selected proposal, along with the RFP and any counter proposal will be incorporated into a formal agreement after negotiations.

1.8 **REQUESTS FOR CLARIFICATION:** Prospective responders shall direct inquiries or questions to RFP *in email form only* to:

Project Manager: Elizabeth Keary Soule, Trustees  
Email ID: ekearysoule@thetrustees.org

All questions are due no later than 11:00am Tuesday, December 13th, 2016. Responses to the Questions will be posted by Thursday, December 15th, 2016 on Old Manse RFP web site at: [http://www.thetrustees.org/oldmanserfp](http://www.thetrustees.org/oldmanserfp).

1.9 **REJECTION OF PROPOSALS:** Trustees reserves the right to reject any Architect on the basis of the proposals submitted.

1.10 **ADDENDUM TO THE RFP:** If any addendum is issued for this RFP, it will be posted on the Old Manse RFP web site at: [http://www.thetrustees.org/oldmanserfp](http://www.thetrustees.org/oldmanserfp).

The Trustees reserves the right to cancel or amend the RFP at any time.

1.11 **SITE VISITS:** Architect may visit the Old Manse property in reference to the services to be provided, but are prohibited from interviewing site staff or other visitors in any effort to obtain information relating to this RFP. All requests for clarification should be submitted in writing as outlined in this RFP. Failure to follow this prohibition could result in the rejection of the proposal.
SECTION 2.0
SCOPE OF SERVICES

2.1 **INTRODUCTION:** Founded in 1891 by Boston landscape architect Charles Eliot, The Trustees have worked for more than 125 years to conserve the cultural, natural, and historic character that makes Massachusetts’ landscapes and communities unique. Our mission is to preserve, for public use and enjoyment, properties of exceptional scenic, historic, and ecological value in Massachusetts. The Trustees protect and steward the irreplaceable, including 116 iconic reservations, six National Historic Landmarks, and one National Natural Landmark. Our cultural resources include nationally significant archaeological sites; cultural ruins; designed and vernacular landscapes and archives; and collections and properties associated with leading national leaders in industry, commerce, politics and the arts.

The Old Manse is one of The Trustees’ most exceptional properties. Built in 1770 for patriot minister William Emerson, this National Historic Landmark was a focal point in Concord’s cultural, political, theological, literary, and social development during the 18th and 19th centuries. Its Native American history is rich and its archaeological resources are carefully protected. The Trustees seek to construct a Welcome Center that will allow the Old Manse to expand beyond the confines of a historic house museum and transform the Old Manse into a model for other historic sites.

2.2 **BACKGROUND:** The Welcome Center at the Old Manse will be a multi-purpose facility intended to increase capacity for humanities programming and interdisciplinary learning, expand and diversify interpretation of the site, enhance the overall visitor experience, and provide community meeting space. The space can invite the estimated 100,000 visitors who walk the grounds each year to learn more about the history of the Old Manse. The center will provide many ways to engage with the Old Manse and will accommodate diverse learning styles and interests. Built to similar dimensions, architectural massing and scale as the original 18th century barn, the building will be sympathetic to the agricultural character of the historic district. The reconstructed barn will include:

**Interpretive display areas** for orientation, permanent display panels, audiovisual presentations, and interactive experiences. The Trustees will present the history of the Old Manse through many lenses and re-interpret the site in the context of contemporary perspectives.

**Programming and workshop space** that can be configured in several ways to accommodate classes, workshops, and lectures.

**Visitor amenities** including a small grab and go food service, bookstore, restrooms, and seating, will allow for longer visits to the property and will provide opportunities for year-round programs.
**Staff office & meeting space** will provide administrative and research spaces for property managers, tour guides, and volunteers.

**Rental space** for private events will allow for enterprise opportunities to raise revenue to support the property. Currently private events take place under a seasonal tent.

Project also includes the interior reworking of two existing spaces: (1) the ‘Shay Shed’, which currently holds meeting space and administrative offices and (2) the Bookstore. These spaces are to be repurposed as interpretive and workshop spaces to support the efforts of the Welcome Center. The design and documentation of this work is to be performed by the Interior Architect with oversight by the Architect.

### 2.1 PROJECT GRANTS:
The Trustees has been recommended for a National Endowment for the Humanities Challenge grant in the amount of $450,000. The Trustees has also secured funding support through a $500,000 Massachusetts Cultural Facilities Fund grant. These grants were applied for using Architectural Schematic Design Drawings by LDa Architecture and Interiors. As a federal and state-funded project, the Architect and all potential sub-consultants will be asked to meet General Terms and Regulations shown in SECTION 5.0.

### 2.2 SCOPE OF WORK

The Architect will:
- Review relevant local, state and federal regulations and policies for their impact on the proposed Welcome Center.
- Use Cultural Landscape Report (by others) as guiding document in understanding site impact and developing design of Welcome Center.
- Work directly with Trustees’ Project Manager to lead coordination efforts of Project Design Team, illustrated in SECTION 4.0.
- Provide Historic Preservation design and documentation services from Schematic through Construction Documentation phases for envelope and exterior of Welcome Center. Design to meet the Secretary of Interior’s Standards for the Treatment of Historic Properties. The interior of the building and the reworking of existing Shay Shed and Bookstore will be designed and documented by Interior Architect, with oversight by Architect.
- Lead Section 106 review process, as required by the National Endowment for the Humanities as well as permitting with Mass Historical Commission as required by preservation restriction.
- Lead permitting efforts with the Town of Concord including public hearings with the Historic Districts Commission and the Natural Resources Committee.
- Assist Trustees with community engagement and outreach with key stakeholders. Assume two (2) presentations to general public and four (4) presentations to key stakeholders.
- Provide construction administration services.
<table>
<thead>
<tr>
<th>Activity</th>
<th>Timeframe</th>
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<tr>
<td>Schematic Design</td>
<td>Through April 2017</td>
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<tr>
<td>Internal and External DD Review</td>
<td>May 2017</td>
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<tr>
<td>Design Development</td>
<td>June – July 2017</td>
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<td>Section 106 Submission and MHC Review</td>
<td>August 2017</td>
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<tr>
<td>Archeological Investigations</td>
<td>September 2017</td>
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<tr>
<td>Permit / Construction Documents</td>
<td>December 2017</td>
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<tr>
<td>Town of Concord Permit Hearings</td>
<td>Through June 2018 (8 month estimate)</td>
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<tr>
<td>Construction</td>
<td>October 2018 – July 2019 (approx. 38 weeks)</td>
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<td>Occupancy</td>
<td>September 2019</td>
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SECTION 4.0
OLD MANSE WELCOME CENTER PROJECT TEAM

Client, Trustees

Architect of Record, Preservation Architect

Archeology Team, UMass Fiske Center

Interpretive Exhibits Designer, TBA

Interior Architect, LDa Architecture

Preservation Landscape Architect, TBA

Structural Engineer

Civil Engineer
SECTION 5.0
GENERAL TERMS AND REGULATIONS

Equal Employment Opportunity
All contracts awarded by grant recipients (Trustees) and their contractors and subrecipients having a value of more than $10,000 must contain a provision requiring compliance with Executive Order 11246, entitled "Equal Employment Opportunity" as amended by Executive Order 11375, and as supplemented in Department of Labor regulations (41 CFR, Part 60).

All contracts and subawards in excess of $2,000 for construction or repair awarded by recipients (Trustees) and subrecipients shall include a provision for compliance with the Copeland "Anti-Kick Back" Act as supplemented in Department of Labor regulations (29 CFR, Part 3). The Act provides that each contractor or subrecipient shall be prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he is otherwise entitled. The recipient shall report all suspected or reported violations to the federal awarding agency.

Davis-Bacon Act (40 U.S.C. 276a to a-5)
All construction contracts awarded by the recipient of NEH grants (Trustees) and subrecipients of more than $2,000 shall include a provision for compliance with the Davis-Bacon Act as supplemented by Department of Labor regulations (29 CFR Part 5). Under this Act, contractors shall be required to pay wages to laborers and mechanics at a rate not less than the minimum wages specified in a wage determination made by the Secretary of Labor. In addition, contractors shall be required to pay wages not less than once a week. The NEH recipient (Trustees) shall place a copy of the current prevailing wage determination issued by the Department of Labor in each solicitation and the award of a contract shall be conditioned upon the acceptance of the wage determination. The recipient shall report all suspected or reported violations to the federal sponsoring agency.

Preservation of Open Competition and Government Neutrality Towards Government Contractors' Labor Relations on Federal and Federally-Funded Construction Projects (Executive Orders 13202 and 13208)
Recipients of NEH grant (Trustees) and subrecipients awarding new construction contracts shall ensure that neither the bid specifications, project agreements, nor other controlling documents for construction contracts shall:
- require bidders, offerors, contractors, or subcontractors to enter into or adhere to agreements with one or more labor organizations, on the same or other related construction project(s), or forbid them from doing so; or
- otherwise discriminate against bidders, offerors, contractors, or subcontractors for becoming or refusing to become or remain signatories or otherwise to adhere to agreements with one or more labor organizations, on the same or other related construction project(s).

Contract Work Hours and Safety Standards Act (40 U.S.C. 327-330)
Where applicable, all contracts awarded by recipients (Trustees) in excess of $100,000 for construction contracts and other contracts that involve the employment of mechanics or laborers shall include a...
provision for compliance with sections 102 and 107 of the Contract Work Hours and Safety Standards Act as supplemented by Department of Labor regulations (29 CFR Part 5). Under section 102 of the Act, each contractor shall be required to compute the wages of every mechanic and laborer on the basis of a standard work day of 8 hours and a standard work week of 40 hours. Work in excess of the standard workday or workweek is permissible, provided that the worker is compensated at a rate of not less than 1½ times the basic rate of pay for all hours worked in excess of 8 hours in any calendar day or 40 hours in the workweek.

Section 107 of the Act is applicable to construction work and provides that no laborer or mechanic shall be required to work in surroundings or under working conditions which are unsanitary, hazardous, or dangerous to his/her health and contrary to safety and health standards promulgated by the Secretary of Labor. These requirements do not apply to the purchases of supplies or materials or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence.

*Rights to Inventions and Materials Generated Under a Contract or Agreement*

Contracts or agreements for the performance of experimental, developmental, or research work shall provide for the rights of the government and the recipient in any resulting invention in accordance with 37 CFR Part 401 and any implementing regulations issued by the awarding agency.