



REQUEST FOR PROPOSALS (RFP)

MASTER INTERPRETIVE PLANNING SERVICES

FOR

**JAMES BRICE HOUSE
42 EAST STREET
ANNAPOLIS, MD 21401**

**Proposals due:
Tuesday, October 11, 2022 - no later than 4:00 PM (EST)**

REQUEST FOR PROPOSALS

Historic Annapolis, Inc. (HA) is requesting proposals for master interpretive planning services to develop the Master Interpretive Plan (MIP) for the James Brice House in Annapolis, Maryland.

The successful Contractor must demonstrate the ability to deliver services that adhere to the requirements outlined in the Request for Proposal (RFP) and provide required references.

The direct point of contact for the RFP is:

Mary-Angela Hardwick, HA Vice President of Education and Interpretation

DUE DATE: If interested, please note that proposals must be received by HA by 4:00 PM (EST) on Tuesday, October 11, 2022

PROPOSALS WILL BE ACCEPTED BY MAIL or EMAIL addressed to the attention of:

Historic Annapolis
Mary-Angela Hardwick
VP of Education and Interpretation
18 Pinkney Street
Annapolis, MD 21401
maryangela.hardwick@annapolis.org

It is the respondent's responsibility to ensure timely delivery and proof of receipt of its response to this RFP. Those who choose to submit proposals by any means other than in person at the published time for the due date will assume all liability for the timeliness of their receipt. No proposals will be accepted after the due date and time.

All proposals shall be prepared at no cost or obligation to HA.

ACKNOWLEDGEMENT: All receipt of proposals submissions will be acknowledged by email.

QUESTIONS AND INQUIRIES

All questions, inquiries, and requests for information or clarification during the reply period for this RFP must be received in writing via email by 4:00 PM (EST) on Wednesday, October 5, 2022.

Questions will not be accepted or responded to via any other method.

Emails should be sent to Mary-Angela Hardwick at
maryangela.hardwick@annapolis.org

The email subject line should be titled: **RFP MIP inquiry**

BACKGROUND

HISTORIC ANNAPOLIS, INC.

Established in 1952, HA is the leading nonprofit preservation and history organization in Annapolis, Maryland. HA's mission is to *Preserve* and *Protect* the historic places, objects, and stories of Maryland's capital city, and provide engaging experiences that *Connect* people to the area's diverse heritage. HA was founded to ensure that the legacy of Annapolis' past would continue to enrich the city's future and was instrumental in getting the Colonial Annapolis Historic District listed on the National Register of Historic Places. HA is a strong advocate for the enforcement of existing ordinances and zoning restrictions that continue to safeguard the city's unique architecture, welcoming waterfront, and scenic vistas. Because of these efforts, Annapolis has one of the largest concentrations of colonial buildings in the nation. HA accomplishments include the restoration and opening of the grand colonial home and garden of William Paca, a signer of the Declaration of Independence; the current state-of-the-art restoration of the James Brice House; a leadership role in the planning for Annapolis City Dock redevelopment; and other preservation efforts on behalf of Annapolis' more than four centuries of history and architecture. HA manages 13 historic buildings, most of which dates to the 1700s and 1800s; administers the Historic Building Marker Program; maintains a collection of 3,000 decorative and fine arts objects, 5,000 architectural drawings and surveys, and 10,000 photographs and slides, operates multiple sites; and provides exhibitions, tours, lectures, special events, hands-on activities, early childhood learning, and living history performances for broad and diverse audiences. HA also serves as a partner to the City of Annapolis' Historic Preservation Commission, Preservation Maryland, and the Maryland Historical Trust. HA operates multiple museums and provides exhibitions, tours, lectures, special events, hands-on activities, early childhood learning, and living history performances for broad and diverse audiences.

THE JAMES BRICE HOUSE

The James Brice House, built between 1767-1774 and located at 42 East Street in Annapolis, Maryland, is a stunning example of colonial architecture with much of its original historic fabric still intact. This five-part Georgian mansion, owned by the State of Maryland and managed by HA, is currently undergoing a full-scale, state-of-the-art restoration to its c.1774 appearance. As the restoration progresses, HA is planning the overall interpretive future of the House to prepare for its opening to the public, anticipated in 2026.

The House is one of the largest and most elegant pre-revolution historic homes in Annapolis. Recognizing the significance of this National Historic Landmark property, the State of Maryland purchased the House in 2014 and entered into a lease agreement with HA to maintain and manage the property on the State's behalf. Since 2016, HA has embarked upon a comprehensive restoration of the building. The renowned experts HA

has assembled for this project are highly respected in their fields and have worked on the nation's most important historic structures including Mount Vernon, Monticello, Montpelier, Drayton Hall, and the Maryland State House.

James Brice was a lawyer and planter, a local and county officeholder, a member of Maryland's Executive Council for many years, and acting Governor for a brief time in 1792. Brice kept a detailed account book which documents precise details associated with the construction of the building. Brice's account book names many of those free, indentured, and enslaved persons who built, worked and lived in the House. Much research remains to be done to gather more details about those individuals including those who were enslaved and served the Brice family over many decades.

The House stayed in the Brice family until the 1870s, when it was purchased by the Martin family. In 1911 it was bought by the proprietors of the nearby Carvel Hall Hotel. St. John's College acquired the House in 1927 and converted it to faculty apartments. Stanley and Helen Wohl bought it in 1953 and restored it back to single-family use. In 1979, the International Union of Bricklayers and Allied Craftsmen purchased the House (later known as the International Masonry Institute) and began using it for office and meeting facilities until they sold it to the State of Maryland in 2014.

SCOPE OF WORK

HA is seeking a highly qualified MIP contractor to work alongside an internal team to formulate a rich, interpretive framework that HA can implement when the House's restoration is complete. The purpose of this project is to develop an MIP for the House to help guide how HA will tell the story of the property and the people associated it. This is an extraordinary 18th-century home with a high degree of integrity, that is rich with existing architectural details, and informed by supporting primary documentation. The MIP will serve as the primary strategic planning document that will inform how the building will be experienced and communicated to the public including through tours, exhibitions, and other various interpretive programs. The MIP should capture and explore the stories of the many people, free and enslaved, who contributed to the construction and who lived and worked in the House. The MIP should offer guidance on programming and educational opportunities to engage visitors and the local community with a deeper understanding of the space and the stories associated with it.

The MIP for the House will provide meaningful visitor experiences through the development of lasting, impactful, and educational narratives. The completed MIP will define the primary themes for interpretation throughout the interior of the building and its exterior spaces; offer recommendations for inclusive programming, including programs to celebrate the upcoming U.S. Semi-quincentennial; and provide a timeline and framework for plan implementation.

The MIP will detail themes and interpretative opportunities for various spaces throughout the building, including the quarters for the enslaved inhabitants. The House offers an extraordinary opportunity to utilize its unique and significant architecture to help inform the customs and routines of all those who lived there and provide deeper insights into the society of 18th-century Annapolis. HA is seeking creative ideas that are forward thinking, innovative, and sustainable.

Project Timeline: The current time frame for the project described herein is 12 months (November 15, 2022 - November 15, 2023).

Tasks: The Contractor will be responsible for working with the HA Project Team, stakeholders identified during the planning process, and the Annapolis community to create and deliver a comprehensive MIP for the James Brice House. The final draft is due by November 15, 2023.

The Contractor will be required to carry out at a minimum the following tasks to fulfill the project:

1. Coordinate with the HA Project Team to establish points of contact, formalize a detailed work plan to include project schedules, deadlines, and meetings, clarify and resolve any issues, and finalize project objectives and goals. Prepare a critical path schedule and submit in reproducible form. In addition to the start and completion of various deliverables, the schedule shall also show percentages of work to be completed at any given time and identify significant dates that will serve as check points to determine compliance with the approved schedule. Indicate critical anticipated dates for work by others which impacts delivery of completed end product.
2. Establish cooperative consultation throughout the process with the HA Project Team, led by HA's VP of Education, and with HA's internal and external stakeholders and subject matter experts. Develop and implement an engagement plan that includes workshops/community stakeholder meetings and provide summaries of each including the names of all participants. HA will work with contractor to identify participants.
3. Conduct meetings with HA and/or HA's designee on a regular basis, to be indicated in project schedule.
4. Schedule and conduct engagement meetings with core HA staff, public stakeholders, partner heritage tourism organizations, and academic experts in fields such as architecture and African American history and with local community historians and relevant community partners, descendants of the Brice family and individuals who lived and worked on or in the Brice House, and others as appropriate to formulate best recommendations for visitor experiences at the James Brice House. In consultation with the HA Project Lead, determine the appropriate number and the scheduling of engagement sessions, consultations, and workshops.
5. At the start of the project, participate in tours of the James Brice House, Museum of Historic Annapolis, William Paca House, Hogshead, Historic Waterfront

Warehouse, Hammond-Hardwood House, the Banneker-Douglass Museum, and the Maryland State House to ensure a full understanding of other HA sites and relevant partner sites.

6. Gather and review previous historic and archival research, site history, archeology findings reports, and preservation planning and other historical, cultural, and environmental resources.
7. Building on past studies and research, identify additional primary research and other specific subject research needed to ensure that the interpretation of the James Brice House is accurate and comprehensive including those who built the House and those who resided there across three centuries as well as the details of its current restoration. Deeper research is needed into the House's builders and inhabitants, to include the free and enslaved craftsmen who built it and the enslaved people who lived and worked in it. As feasible within the scope of the MIP, assist HA in the identification and locating of these descendants so that HA may record and share their family stories.
8. Provide a profile of potential target audiences, including, but not necessarily limited to, city and county residents, school groups, and regional, national, and international visitors to Annapolis. Profile should include descriptions of each target audience.
9. Identify and provide detailed descriptions of key primary and secondary interpretive themes, main messages, and specific storylines and conduct a workshop with the HA Project Team to confirm and prioritize those interpretive themes, main messages and storylines.
10. After interpretive themes and main messages have been approved by HA, prepare and deliver a 10-year MIP to include the framework for interpretive visitor experiences and the timeline for implementation, as well as additional recommendations for future research and for programming beyond the 10-year MIP. The MIP should also include identification of visitor experiences and site use including tours, exhibits, media and apps, interior interpretive signage, wayside exterior exhibits, programs and special events, off-site outreach, hands-on activities, community engagement, partnership opportunities, and state desired objectives and outcomes. Planning will take into consideration universal design, accessibility options for diverse audiences and those with special needs that comply with the Americans with Disabilities Act. MIP should include prioritization and checklist for implementation.
11. Provide the HA Project Team with a draft MIP for review, final comments, and edits.
12. Revise the draft MIP based on the HA Project Team's feedback.
13. Final Deliverable: Submit final HA-approved MIP with all necessary appendices as two (2) bound hard copies and one electronic copy.

SCOPE OF SERVICES

The Contractor must be able to provide professional interpretive planning and project management services including scheduling, coordinating, overseeing, and managing work produced under this contract as described in the Scope of Work and deliver a final

MIP that is a well-researched, well-developed, and well-written. The final James Brice House MIP should present diverse perspectives culminating in a collaborative consensus for a long-range vision for interpretation and visitor experiences at the James Brice House. The MIP must support HA's goals, align with the Historic Annapolis Strategic Plan, 2015-2025 and be cost-effective and sustainable by HA.

RFP SUBMISSION REQUIREMENTS

Responders to this RFP must provide the following as part of their proposal for consideration:

1. Statement of Interest including the firm's name, address and lead contact person and contact's information.
2. Discussion of the firm's interest in this project, interpretive planning experience, and project management philosophy, and approach to achieving project goals must be included. We are seeking a customized vision for the project, not boilerplate submissions.
3. Qualifications must include the firm's background, profile, experience, and accomplishments in master interpretive planning. Supportive material must include the names, resumes and list of similar master interpretive planning projects completed by all personnel who may be involved in this project. A breakdown of current individual workloads and anticipated availability to this project now and as anticipated during the duration of the James Brice House MIP project timeline is required. If subcontractors are included on the team, please indicate and provide a description of the working relationship. Identify at least one team member who will serve as the primary point of contact.
4. List of three to five (3-5) similar projects done by the firm with an emphasis placed on projects with a similar focus as those described in this RFP.
5. A list of references for clients of similar projects which include the name, title, email, and phone number of a contact person, project description, size, and complexity, and agreed upon and actual fees.
6. A draft project work plan and timeline, with project completion date no later than November 15, 2023.
7. Proposed budget and list of the firm's proposed classified hourly rates to be in effect for the duration of this contract. The proposed budget should be as thorough as possible including all estimated reimbursable expenses, billing structure, and assumptions used in determining overall project costs and how cost estimates are established and will be controlled.
8. Provide certificate of insurance for current coverage.

9. Any additional information that would benefit your Proposal submission.

NOTE: By submitting a Proposal, the respondent authorizes HA to contact any or all those firms or individuals listed as references, contacts, subcontractors, and collaborators mentioned within the information provided.

AWARD EVALUATION CRITERIA

Proposals will be evaluated by the HA Project Team.
Interviews will be scheduled by HA after the submittal deadline.

The following factors will be considered:

1. Complete response to all of the items in this RFP. (20%)
2. History and experience of the firm in performing the requested work for similar projects. (20%)
3. A clear understanding of the services requested. (20%)
4. An ability and willingness to work collaboratively with others including outside community stakeholders and community leaders. (15%)
5. Cost. (25%)

REJECTION OF PROPOSALS

HA reserves the right to reject any or all proposals received in response to this RFP, or to cancel this RFP, if it determines such action is in the best interests of HA. HA may reject any proposal if it is conditional, incomplete, or if it contains any irregularities.

MISCELLANEOUS CONDITIONS

1. This RFP is non-binding and is not a contract offer. Legal obligations will arise only after the negotiation and signed execution of a formal contract between HA and the Contractor finally selected by them.
2. Submissions of a Proposal will serve as full proof that the respondents have full knowledge of the nature and quality of the work to be performed. No materials submitted in response to this RFP will be returned.

INSURANCE AND INDEMNITY

1. Protection of Persons and Property

Contractor shall protect all materials and equipment for which he is responsible.

He/she/they shall replace all materials and equipment which may be lost, stolen or damaged at his/her/their/expense.

2. Insurance

The insurance required under this section shall protect the Contractor and his/her/their subcontractor(s), respectively, against damage claims, which may arise from operations under this contract whether such operations be by the insured or by anyone directly or indirectly employed by the Contractor.

The Contractor, prior to commencing work, shall provide HA with Certificate of Insurance for the following coverage naming HA as additional insured:

- a) Workers Compensation – minimum of \$500,000.00. In the event any work is sublet, the Contractor shall require the Subcontractor similarly to provide Workers Compensation Insurance for all of the latter's employees to be engaged in such work unless such employees are covered by the protection afforded by the Contractor's Workers Compensation Insurance.
- b) General Liability - single limit of \$1,000,000.00/\$2,000,000.00 aggregate for bodily injury and property damage.
- c) Automobile Liability insurance - single limit of \$1,000,000.00 for bodily injury, property damage per occurrence
- d) Professional Liability insurance applicable to services to be rendered under this agreement with limits of \$1,000,000.00/\$2,000,000.00.

3. Indemnification

The Contractor shall indemnify and hold harmless HA and its partners including the State of Maryland, as well as their Employees, Agents, and Servants from and against any and all losses, penalties, damages, settlements, costs, charges, professional fees (including attorneys' fees) or other expenses or liabilities including the investigation and defense of any claims, arising out of or resulting from the performance of the Contractor work or the completed operations provided that any such claim, damage, loss, or expense (a) is attributable to bodily injury, sickness, disease or death, or to injury or to destruction of tangible property including the loss of the use resulting therefrom, and (b) is caused in whole or in part by any negligent act or omission of the Contractor, or anyone directly or indirectly employed by them or anyone for whose acts they may be liable (including a claim by an employee of the Contractor) regardless of whether it is caused in part by a party indemnified hereunder.