



PRESERVATION MARYLAND

REQUEST FOR PROPOSALS

Old South Mountain Inn Historic Structure Report and Feasibility Study

Preservation Maryland, a nonprofit organization headquartered in Baltimore, Maryland, is soliciting proposals from qualified historic preservation professionals for the completion of a Historic Structure Report and feasibility study for the adaptive reuse of Old South Mountain Inn, located at 6132 Old National Pike, Boonsboro, MD 21713.

To be considered as eligible, Respondents must meet one or more of the Professional Qualification Standards—or their equivalent—as set forth by the Secretary of the Interior’s (SOI) Standards and Guidelines; and have demonstrated experience in historic preservation.

Preservation Maryland requests that interested parties respond to the solicitation by **4:30 P.M. ET** on Thursday, **April 3rd, 2025**.

1. CLIENT

Preservation Maryland is a statewide non-profit working to protect Maryland’s unique and irreplaceable heritage while creating a more equitable and sustainable future. The organization harnesses the power of historic places to revitalize and reinvest in communities, advocate, and build the historic trades workforce for the benefit of all Marylanders. To learn more, visit www.preservationmaryland.org.

2. PROJECT OVERVIEW

2.1 Background

Owned by the State of Maryland and managed by the Maryland Department of Natural Resources - Maryland Park Service (DNR), the Old South Mountain Inn (OSMI) is a key contributing resource in the NRHP-listed Turner’s and Fox’s Gap Historic District. Sited at 6132 Old National Pike, Boonsboro, MD 21713 (parcel 0014, tax map 0074), the structure is a two-story, five-bay, gable roof, stone house that includes several rear additions and a glass-enclosed side addition, which is slated for selective demolition, to the east of the primary building. The structure has an above grade living area of 7,754 square feet. Historically known as the “Mountain House,” parts of the structure may date back to the late 1700s.

The Inn itself was a popular stop along the historic National Road corridor in the early 1800’s. Several notable historic figures including Abraham Lincoln, Daniel Webster, and Henry Clay are believed to have stopped there on trips to and from Washington, DC. During the Civil War, the structure served as the headquarters for Confederate Major General Daniel Harvey Hill during the Battle of South Mountain. After the war, Madeleine V. Dahlgren purchased the Inn and converted it into a private residence. In the 20th century, the Inn was converted into a tavern and restaurant and served as such until DNR acquired the property in 2023.

Old South Mountain Inn sits at an intersection of notable historic and recreational resources, and the location and building itself offer opportunities for tourism and visitor services for both Frederick and Washington Counties. It is located along Alternate US Route 40, which is part of the Historic National Road Scenic Byway. The property also borders the Appalachian National Scenic Trail, is in close proximity to the Dahlgren Backpacking Campground, and is close to the entrance of Washington Monument State Park. Its history encompasses not only the story of the Battle of South Mountain but lesser-known stories of women’s roles, enslaved people and free Blacks, American Indians, frontier settlement, and the Appalachian Region.



2.2 Description

Acting as project manager on behalf of DNR, Preservation Maryland is seeking consultant services for the completion of a Historic Structure Report (HSR) in accordance with Preservation Brief 43 and an adaptive reuse feasibility study. The recent acquisition of the Old South Mountain Inn provides a unique opportunity to create a new visitor center for the South Mountain Recreation Area and to engage key stakeholders in efforts to interpret the area's rich history. The overall goal of the initiative is to develop a visitor center, the planning and interpretation for which has been informed by stakeholder and community feedback, with exhibits and programming that highlight associated histories, and services/amenities that support and attract park visitors.

The primary components of this project are an HSR and adaptive reuse feasibility study for the Old South Mountain Inn. The HSR will follow guidelines established in Preservation Brief 43 and serve as a base for the feasibility study. The study will further consider architectural analysis for adaptive reuse that is sensitive to the inn's historic fabric and history, explore design concepts accordingly, and develop an implementation plan accompanied by a high-level cost analysis with phasing options. These reports will be used to inform funding appropriation, as well as preservation, operational, and interpretive planning for the site.

Project objectives include:

1. Comprehensively research, document, and establish a period of significance for the Old South Mountain Inn and its character defining features to develop a preservation plan that informs future adaptive reuse as a park visitor center and education hub.
2. Develop a concept for adapting the Old South Mountain Inn building and site into a visitor center and educational hub for the South Mountain Recreation Area that aligns with the preservation plan, incorporates DNR, stakeholder, and community feedback, and considers site and building needs for operation, interpretation, programming, space use, amenities, etc., and their associated costs.

This project is being executed in partnership with the Maryland Department of Natural Resources. As such, both Preservation Maryland and DNR staff will be involved throughout the entire project. Preservation Maryland will serve as the main point of contact, contract signatory, invoice recipient, and liaison between the hired project professionals and government agencies, which will include coordination of document submittal. It is anticipated that DNR will be involved in the kick-off and status meetings, charettes, project documentation review, and site visits and will serve as final authority on decisions.

2.3 Timeline

Work will begin immediately upon award, with a goal of completing the project, including final submission and approval of all deliverables, within 12 months. Respondents should account for a period within this timeline to incorporate minor revisions, as requested by DNR, into the final report.

3. SERVICES AND SCOPE OF WORK

The precise scope of work is subject to feedback from the selected consultant(s) and budget limitations. However, anticipated work to be undertaken by the consultant(s) may include, but is not limited to, the following:

1. Conduct historical research and review of existing site and historical documentation to establish site history and chronology of site development (See **Attachment A: Existing Building and Site Documentation**)



2. Complete an existing conditions assessment, including but not limited to architectural, structural, and MEP analysis, HAZMAT survey, and digital photographs
3. Complete a site survey that assesses existing utilities (water, sewage, stormwater), electric, and communications (See **Attachment A: Existing Building and Site Documentation**).
4. Conduct a Phase 1 Archaeological Investigation of the 3.5-acre site in accordance with the Maryland Historical Trust's (MHT) [Standards and Guidelines for Archaeological Investigations in Maryland](#). This may be reduced to a Phase 1A investigation conditional to budget limitations. Respondents should refer to Section 5.4 for how to indicate respective costs for this work item in their proposed budget to ensure accurate evaluation.
5. Develop as-built drawings, to include elevations and floor plans
6. Update the Inn's Maryland Inventory of Historic Properties file and complete Determination of Eligibility documentation for individual listing on the National Register of Historic Places
7. Prepare a draft HSR per history, existing conditions, and DNR priorities that will be finalized with and incorporated into subsequent feasibility study.
8. Engage with DNR, stakeholders, project partners, and the public virtually and in-person throughout the project (See **Attachment B: Current Project Stakeholders**) to establish programming and interpretive needs and design three (3) reuse concepts for review and consideration, of which one will be selected for final implementation recommendations and cost estimating. Potential items to explore may include:
 - I. spatial programming for interpretation/exhibits, office space, meeting rooms, public amenities, and ADA accessibility; reuse design informed by the HSR and allowing for modern utilities and climate control suitable for housing period artifacts and displays; site infrastructure needs; and landscaping and trails
9. Prepare a feasibility study for a new visitor center that includes the following elements:
 - I. Executive summary
 - II. Outline of planning process and public engagement efforts, establishing:
 - a) Vision and mission statements
 - b) DNR goals and objectives
 - III. Site description and significance
 - IV. Interpretive and programming aims
 - V. The three concepts and their pros and cons
 - VI. Renderings and description of the final selected concept
 - VII. Implementation plan with prioritized work recommendations per the HSR, DNR priorities, and stakeholder feedback
 - VIII. Preliminary cost estimate for the selected concept with phasing options
 - IX. Completed HSR



10. Prepare materials/presentations complete with text, graphics, images, and, where appropriate, renderings for:
 - I. at least two (2) stakeholder engagement charettes (one in-person & one virtual);
 - II. one (1) presentation of the three proposed re-use concepts;
 - III. two (2) opportunities for public feedback, which may be in the form of online surveys, meetings, etc. Engagement plans will be finalized at project kick-off based upon DNR preferences and consultant recommendations.
 - IV. one (1) presentation of the final report
 - V. Digital dissemination
11. Prepare and provide quarterly status reports due March 1; June 1; September 1; December 1 until the conclusion of the project
12. Meet with Preservation Maryland and DNR staff both virtually and in-person, as needed, including but not limited to at least three (3) virtual meetings for project kick-off, mid-point, and close-out, as well as meetings for progress reviews and/or site visits

Work performed shall adhere to the Secretary of the Interior's Standards, Preservation Brief 43, and all local, state and federal laws and regulations. All work and final products are subject to DNR approval and shall incorporate any changes requested by DNR staff to their satisfaction.

4. NOT TO EXCEED AMOUNT

This project is supported by grant funding. As such, **all** costs are limited to a **not-to-exceed (NTE) budget of \$400,000**. This amount includes all costs incurred in connection with the work outlined herein. In no event shall the Consultant be entitled to receive more than the NTE. This may result in necessary modification(s) to the scope of work, which Preservation Maryland and DNR staff will discuss with the selected Respondent as necessary. Competitiveness of the budget will be considered as part of the proposal review process.

5. INSTRUCTIONS TO RESPONDENTS

5.1 Where to Deliver Submittal

All submittals must be submitted as a single PDF attached to an email delivered to mpelta-pauls@presmd.org.

5.2 Submittal Due Date

Submittals are due by **4:30 P.M. ET on Thursday, April 3rd, 2025**.

5.3 Pre-bid Meeting

Respondents may choose to attend a pre-bid meeting during a scheduled site visit at **10:00 A.M. ET, Wednesday, March 12th, 2025**. Please email Maggie Pelta-Pauls at mpelta-pauls@presmd.org by **4:30 P.M. ET, Tuesday, March 11th, 2025** to confirm attendance.



5.4 Preparation of Submittal

Respondents must submit the following:

- Qualifications for the project, including names, titles, and experience of key personnel
- Description of recent experience on projects similar in scope and scale
- Project proposal
- Project timeline that indicates durations for key tasks and the overall project
- Itemized project budget, with respective costs for the Phase 1 Archeological Investigation research services v. field survey services separately identified

Respondents shall submit one (1) digital copy of the submittal package as an attachment to an email and are encouraged to include as much pertinent data and information as necessary to ensure proper evaluation.

5.5 Subcontracts

Respondents must identify all portions of the work intended to be performed through subcontractors. Acceptance of the proposal does not constitute approval of the subcontractors identified therein.

5.6 Minimum Qualifications

Respondents must demonstrate personnel assigned meet one or more of the Professional Qualification Standards—or their equivalent—as set forth by the Secretary of the Interior’s Standards and Guidelines; and have demonstrated experience in historic preservation.

5.7 Small Business Enterprise (SBE), Minority Business Enterprise (MBE) and/or Woman-Owned Business Enterprise (WBE)

Respondents are not required to be or have subcontractors who are certified SBE, MBE, and/or WBE companies. However, use of SBE, MBE, and/or WBE companies is encouraged and may be weighted as an element of the evaluation process.

5.8 Inquiries

Every request for a written interpretation or correction must be received at least ten (10) days prior to the RFP due date—no later than **4:30 P.M. on Thursday, March 20th, 2025**—in order to be considered. Requests may be submitted by e-mail to mpelta-pauls@presmd.org. Preservation Maryland will endeavor to answer questions as they arise on a rolling basis. However, all interpretations, corrections, and supplemental instructions will be communicated by written addenda to this solicitation to all prospective Respondents no later than five (5) days prior to the RFP due date.

Submission of a proposal constitutes acknowledgment of receipt of all addenda. Proposals will be construed as though all addenda had been received. Failure of the Respondent to receive any addenda does not relieve Respondents from any and all obligations under the proposal, as submitted.



5.9 Rejection of Submittal

Proposals must be delivered to the specified location and received by the proposal due date to be eligible for evaluation. Proposals will be considered irregular and may be rejected if they show material omissions, additions not called for, conditions, limitations, unauthorized alternate proposals or other material irregularities. Preservation Maryland reserves the right to reject submittals not prepared and submitted in accordance with the provisions specified herein and reserves the right to waive any minor deviations or irregularities in an otherwise valid submittal.

6. EVALUATION AND SELECTION PROCEDURES

6.1 Evaluation Procedure

Each response will be evaluated in accordance with the indicated criteria. Special consideration may be given to Respondents who demonstrate familiarity with eighteenth and nineteenth century architecture, as well as Maryland state history, particularly the Civil War-era.

1	<p>Background and Qualifications</p> <p>a) Special expertise of personnel, especially:</p> <ul style="list-style-type: none"> - Feasibility Studies - Historic Structure Reports <p>b) Past performance, with demonstrated research and writing skills</p> <p>c) Demonstrated experience coordinating with multiple stakeholders</p> <p>d) Knowledge of subject, specifically:</p> <ul style="list-style-type: none"> - 18th & 19th century architectural history - Relevant historic architecture & archaeology
2	<p>Project Approach</p> <p>a) Names and functions of personnel assigned</p> <p>b) Equipment and resources</p> <p>c) Ability to meet project needs, including current workload</p> <p>d) Commitment to project completion within time and budget constraints</p>
3	<p>Technical Merit</p> <p>a) Demonstrated comprehension of tasks to be completed</p> <p>b) Completeness and clarity of submittal</p>

6.2 Award

Acceptance of the successful Respondent’s proposal does not create a contractual relationship between Preservation Maryland and the successful Respondent. Preservation Maryland reserves the right to award the agreement to the next available Respondent in the event the successful Respondent fails to enter into the agreement, or the agreement with said Respondent is terminated within 30 days of the effective date.

7. EXECUTION OF AGREEMENT

Submittal of a proposal binds the successful Respondent to perform the work upon acceptance of the proposal and Preservation Maryland’s execution of the project agreement provided by the successful Respondent.



Upon acceptance of the proposal, the successful Respondent must provide:

- Contract/Agreement for review
- Completed Form W9
- ACH payment information, if EFT preferred
- Satisfactory evidence of insurance coverage as described in *Section 7.1 Insurance Requirements*

Preservation Maryland reserves the right to cancel award of the agreement without liability at any time before the agreement has been fully executed by all parties. Failure upon the part of the successful Respondent to execute the agreement or timely submit the required documentation will be just cause, if Preservation Maryland so elects, for award of the agreement to be rescinded.

7.1 Insurance Requirements

Respondents should be aware that an execution of any contract arising from the RFP process will require proof of the following insurance coverage, as applicable, with at least the minimum limits required by the State of Maryland:

Commercial General Liability

Each Occurrence	\$1,000,000
General Aggregate	\$2,000,000

Automobile Liability

Combined Single Limit	\$1,000,000, - Includes Owned, Non-Owned & Hired Autos
-----------------------	--

Workers Comp

Each Accident	\$1,000,000
---------------	-------------

Professional Liability

Limit Per Claim	\$1,000,000
-----------------	-------------

Umbrella Liability

Each Occurrence	\$2,000,000
Aggregate	\$2,000,000



Attachment A:

Existing Building and Site Documentation

Existing documentation includes but is not limited to the following. Respondents may request access to the below listed documentation by emailing Maggie Pelta-Pauls at mpelta-pauls@presmd.org.

- 1) *A Brief History of South Mountain House*, Lemoin Cree
- 2) *Old South Mountain Inn*, Byron L. Williams
- 3) Phase I Environmental Site Assessment – Executive Summary
- 4) NRHP Nomination Form (NR – 1510): Turner’s and Fox’s Gap Historic District
- 5) MIHP File (WA – II – 1174): Turner’s and Fox’s Gap Historic District
- 6) MIHP File (WA – II – 001): Old South Mountain Inn (South Mountain House)



Attachment B:

Current Project Stakeholder List

- 1) [Maryland State Parks – Department of Natural Resources](#)
- 2) [Washington County, Maryland](#)
- 3) [Frederick County Maryland](#)
- 4) [Town of Boonsboro](#)
- 5) [Town of Middletown](#)
- 6) [City of Frederick](#)
- 7) [Heart of the Civil War Heritage Area](#)
- 8) [Civil War Trails](#)
- 9) [Potomac Appalachian Trail Club](#)
- 10) [Visit Frederick](#)
- 11) [Visit Hagerstown & Washington County](#)
- 12) [National Park Service \(Appalachian Trail\)](#)