SCOPE OF WORK

National Historic Landmarks
Modern Historic Preservation Movement in the Southeastern United States

Historic Context Study

Scope

This scope of work directs the contractor to prepare a Historic Context Study addressing the modern historic preservation movement in the Southeastern United States, with particular emphasis on the emergence of organized, municipal- and district-scale preservation efforts during the early to mid-20th century.

This context study will inform future National Historic Landmark (NHL) evaluations and updates, including reassessment of existing NHL designations where preservation history may constitute an area of significance. The study will be used as a comparative and analytical framework, not as a nomination document.

The contractor shall provide all materials, supplies, labor, supervision, coordination, and management necessary to complete the work as and when required, as specified in this scope of services.

Confidentiality

The information developed under this task order is the property of the U.S. government and shall be kept in strict confidence.

Performance Period

The work shall begin following the issuance of the delivery/task order, proceed by the schedule for submittals, and be completed no later than 15 months after the award.

Points of Contact

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Purpose

The purpose of this project is to develop an NHL-appropriate historic context for the modern historic preservation movement in the Unites States, focusing on the period during which preservation emerged as an organized, systematic, and increasingly institutionalized practice. The study will examine the evolution of preservation from largely commemorative and private efforts into coordinated municipal, nonprofit, and governmental programs, with particular attention to district-scale preservation, local regulatory frameworks, and professionally informed preservation philosophies that developed during the early to mid-20th century. This context will define preservation activity itself as a historical phenomenon, distinct from the age, style, or associative significance of the historic resources that preservation efforts sought to protect.

The resulting historic context is intended to support comparative evaluation and thematic refinements for NHL designation, including future updates to existing NHL documentation. The study will provide analytical tools to assess how preservation planning, advocacy, regulation, restoration, and interpretation may constitute areas of historical significance. By establishing a framework and comparative baseline, the study will enable the National Park Service (NPS) to more fully evaluate the role of preservation history in NHL eligibility and to situate individual cities, districts, organizations, and initiatives within a broader national narrative of modern historic preservation.

Project Background

National Historic Landmarks are nationally significant historic places that possess exceptional ability to illustrate and interpret American cultural heritage. The NHL Program, established in 1935, is administered by the NPS on behalf of the Secretary of the Interior and is responsible for helping to preserve and protect the almost 2,600 NHLs nationwide. Through this program, the NPS works in partnership with preservation officials, private property owners, and other stakeholders to support the nomination, stewardship, and long-term preservation of nationally significant historic properties. The program's emphasis on national significance requires a rigorous, analytical approach to evaluation that situates properties within broader patterns of American history and culture.

A distinguishing feature of the NHL Program is its reliance on comparative analysis developed from a national perspective. While National Register of Historic Places nominations must demonstrate that a property played an important role within a significant area of history, they do not necessarily require a comprehensive understanding of all comparable properties nationwide. In contrast, NHL nominations are expected to include a complete and thoroughly researched analysis of all known similar properties within a defined historic context and to document the

relative national significance of a nominated property in comparison to those resources. This expectation places a premium on well-developed historic contexts that clearly define themes, property types, periods of significance, and evaluative criteria at the national level.

Historic context studies are therefore essential tools for the NHL Program. They provide the analytical foundation necessary to identify and compare resources associated with a particular theme, movement, or historical development and to assess their relative importance with the national narrative. In the case of the modern historic preservation movement, a clearly articulated historic context is critical to evaluating how preservation planning, regulation, advocacy, restoration, and interpretation may themselves constitute areas of historical significance. This project background establishes the need for a focused historic context study to support consistent, defensible NHL evaluation and future updates to existing NHL documentation.

Statement of Work

A historic context provides the political, social, cultural, and economic background necessary to understand a particular idea, event, movement, or individual within a specific time period. The completed study will apply this approach to the modern historic preservation movement in order to situate preservation-related properties within the national historical framework. A clearly articulated historic context enables evaluation of whether a property represents the best, or among the best, illustration of a nationally significant historic movement.

The research will meet NPS standards for a thorough investigation, meaning that research will be done in selected published and documentary sources of known or presumed relevance that are readily accessible without extensive travel and that promise expeditious extraction of relevant data.

The completed historic context study will be used by the NPS to support future NHL evaluations, updates, and thematic refinements by providing a national-level comparative framework for resources associated with the modern historic preservation movement. The study is intended solely as an analytical and comparative tool and will not, by itself, nominate, amend, or modify any NHL.

Tasks

1. **Meetings and Coordination**: Following the contract award, the contractor shall schedule and conduct an orientation and planning virtual meeting with the Project Team to discuss the project scope, roles and responsibilities, sources of information, and the proposed project schedule. The contractor shall also participate in virtual review meetings with the Project Team following the submission and review of each required deliverable. The contractor's principal investigator shall be responsible for coordinating all product submittals, providing regular status updates, and remaining available for additional virtual meetings, as needed, with Project Team members throughout the period of performance.

2. **Annotated Outline and Preliminary Bibliography**: The contractor shall prepare an annotated outline that establishes the organizational structure and analytical direction of

the historic context study. The outline shall identify the proposed themes or areas of significance, geographic parameters, and temporal limits associated with the modern historic preservation movement and shall include brief narrative annotations describing the intended content of each major section. As part of this task, the consultant shall identify and propose representative case-study locations that illustrate major preservation strategies, philosophies, or historical developments relevant to the context. The consultant shall also submit a preliminary bibliography of primary and secondary sources demonstrating reliance on existing documentation and scholarship.

3. **Background History and Development of the Theme**: Following approval of the outline, the contractor shall prepare narrative sections that provide the historical background necessary to understand the emergence and evolution of the modern historic preservation movement. This work will synthesize existing documentation to describe relevant political, social, cultural, economic, and institutional influences that shaped preservation practice during the defined period of significance. The narrative shall identify major organizations, initiatives, and historical developments that contributed to the movement's growth and institutionalization at the national level.

4. **Associated Property Types**: Building on the approved narrative framework, the contractor shall identify and define the types of properties associated with the historic preservation movement addressed in the context. The contractor shall describe patterns of occurrence, distribution, and survival, and prepare a property type matrix and accompanying descriptions.

5. **Physical Characteristics, Integrity, and Evaluation Guidance**: The contractor shall develop guidance addressing the physical characteristics and integrity considerations applicable to resources associated with the preservation movement. This task will define the associative and physical attributes necessary for properties to convey significance within the established context and will address issues related to restored or reconstructed environments and evolving historic districts. The consultant shall also prepare a section providing analytical guidance for applying evaluation criteria within the context.

6. **Final Historic Context Study**: The contractor shall finalize the narrative, integrate all required components of the historic context, and complete supporting documentation, including a bibliography of sources consulted. The final submission shall consist of the completed historic context study and all associated materials in editable digital format suitable for future NPS use.

Deliverable Products

The contractor will present the components in a detailed final Historic Context Study report, anticipated to be approximately 150-200 pages in length. The report will include appropriate maps, tables, and photographs to support the text and the author's recommendations.

In addition to the professionally produced Historic Context Study, other deliverables include a well-organized copy of all research notes, photos, and electronic documents, except copies of

photographs or documents for which another institution has either the copyright or, has placed restrictions on its distribution. The researcher's final draft, including all photographs, maps, etc. shall become the intellectual property of the NPS. The study will include a comprehensive list of references and a list of information repositories. Appendices, including relevant existing documentation, tables, maps, and sources will be included as noted above.

Report Format

Frontmatter will include a concise executive summary that summarizes the historic context study in a clear and accessible manner that is useful to cultural resource professionals, NHL Program staff, and resource stewards, as well as the expected table of contents, list of illustrations, list of tables, acknowledgments, and list of abbreviations and/or acronyms that must include nonstandard abbreviations and acronyms used in the report. The spelled-out version of a term should be given the first time the term appears within the study but may be replaced by an acronym thereafter.

The main body of the historic context study must include an introduction and must include the components of a context. The historic context study will include a statement of context, background history, definition of the context, development of the theme or area of significance, associated property types, physical characteristics and integrity, relationship to the NHL Criteria, and a bibliography, as well as a clear conclusion with a closing statement that provides further comment, if appropriate, on the interpretation of the information found in the study.

The references must list the primary and secondary source materials researched and used for the preparation of the study broken into sections by kinds of materials (i.e., primary, and secondary sources, etc.) as directed in *The Chicago Manual of Style* (18th edition or later). Back matter includes appendices, including tables, assessment or inventory forms, copies of key documents, and geospatial data.

The researchers will deliver the final version of the historic context study to the NPS as a print-ready 508 compliant Adobe Acrobat formatted PDF file and as other electronic files (e.g., Microsoft Word). The general formatting of the document will be in portrait orientation with a single column of text to ease readability in electronic form, laid out with mirror margins: 1.25 inches inside; .75 inches top, bottom, and outside; and headers and footers should be 0.5 inches from the edge of the paper. The text should be left-justified, tabbed right in block paragraphs with no indent, set-in single-spaced lines with paragraphs double spaced

All illustrations used in the final document will be credited. If any of the illustrations carry restrictions (such as one-time-use limitations), the researchers will provide this information to the NPS. The electronic file(s) supplied to NPS will be adequate for transmission to a printer or for incorporation into a final file or files to be prepared by NPS for transmission to a printer to be selected by the NPS.

All photographs and other illustrations will be fully referenced to their source, including a catalog

or accession number, drawing number, etc., if applicable. Appropriate permissions will be obtained for the use of all illustrations.

All digital images used in the document shall be individually scanned relative to the final image size in the report at a minimum of 300dpi, JPEG or TIF format, medium-high to high resolution. The resolution of original files should not be increased to meet this requirement. Image files should be saved through FTP transfer in a folder entitled "IMAGES." Image files should be named as follows: Subject, Figure #, Brief Description, Year taken.

Additional formatting guidance includes:

- Leading (space between lines of type in a paragraph) should be chosen for readability. In general, at least two extra points of leading (e.g., 12/14) are advised.
- All headings should be caps/lowercase; all upper-case headings are never to be used.
- The use of bold, underline, and italic type within the text should be limited.
- The traditional American form of dates will be used: August 18, 1978.
- In the text, the treatment of numbers will be consistent with the *Chicago Manual of Style*.
- All numbers used with units of measurement will be numerals (e.g., windows measure 2 feet by 4 feet).
- Footnotes or notes at the end of each chapter may be used. Endnotes for the whole document will not be used.
- The most current edition of the *Chicago Manual of Style* should guide questions of style that are not addressed here. Most publications use the humanities-style notation (see Chapter 15). If the manual offers options or does not address an issue, consistent treatment within the document should be the rule.
- The latest edition of Webster's Dictionary should be used for spelling.
- Acronyms should be introduced in parentheses after the full name at the first appearance of the full name. Acronyms may then be used for subsequent references.

Stipulations

1. The contractor and key team members will meet the requirements specified in 36 CFR Appendix A, Professional Qualification Standards, and the intent of Section 112 (a)(1)(of the National Historic Preservation Act of 1966, as Amended through1992. (http://www.cr.nps.gov/local-law/arch_stnds_9.htm)

2. The contractor shall coordinate with the COR as necessary to complete the work as and when required and determine the appropriate point of contact. This coordination must include participating in consultant-led regular monthly conference calls and product review meetings.

3. All work shall be technically and legally defensible. In evaluating national significance within the developed context, the contractor shall apply the guidelines from the *NHL Bulletin: Guidelines for Preparing National Historic Landmark Nominations*. (NHL Bulletin - National Historic Landmarks (U.S. National Park Service)

4. Contractor shall use *Chicago Manual of Style*, 18th edition or later.

5. The Historic Context Study should be written in Plain Language to the degree possible and make use of the Harper's Ferry Center Editorial Style Guide to inform the use of language. (https://www.nps.gov/subjects/hfc/hfc-editorial-style-guide.htm)

6. Research will meet NPS standards for a thorough investigation, i.e., research will be done in readily available primary and secondary source material and perform on-site archival investigations as necessary in sources of known or presumed relevance. This study will require archival and primary source research at repositories.

7. All documentation (field and research notes, photographs and negatives, sketches, finished original drawings, narratives, computerized inventories, forms, assessments, GIS Shapefiles, and reports) produced by the contractor in connection with this project are to become the property of NPS (public domain). All documentation shall be delivered to the NPS upon completion of contract services. The completed documentation may be used and reproduced in any fashion that the NPS chooses, with appropriate credit given to the researcher. A researcher may publish articles based on the research covered under these contracts if appropriate credit is given to the NPS.

8. The contractor's quality control efforts shall ensure that all draft and final deliverables are completed documents, as specified, that have been reviewed for academic excellence, professional and copy quality and technical accuracy. Documents not displaying such efforts will not be accepted.

9. The Contractor shall disclose in writing any use of generative artificial intelligence (AI) tools in the development of deliverables. Disclosure shall include the name of the tool, the nature of the use (e.g. formatting, copyediting, outline structuring) and confirmation of human review and verification.

10. Generative AI tools shall not be used to generate historical analysis, research findings, citations, archival references, or interpretive conclusions. All research, interpretation, and citations must be based on verifiable primary and secondary sources reviewed by the Contractor.

11. All deliverables shall be prepared and reviewed by a professional Historian meeting the Secretary of the Interior's Professional Qualification Standards. The Contractor remains responsible for the accuracy, originality, and scholarly integrity of all submitted work.

Project Schedule and Submission of Deliverables

All work specified shall be completed in accordance with the following schedule, no later than one year from the contract award. The NPS will provide consolidated comments within 30 days of receipt:

DELIVERY ITEM	DATE
Contract Award	
Orientation and Planning Call	Within 15 Days of the Award
Annotated Outline, Proposed Case Studies, and Preliminary Bibliography (30% Submission)	Within 60 Days of Orientation Call
NPS Technical Review No. 1 (30 days)	30 Days
Submit Draft Background History, Development of Theme, and Property Types (60% Submission)	Within 75 Days of Receipt of NPS Comments
NPS Review Technical Review No. 2 (30 days)	30 Days
Submit Complete Draft Historic Context Study, Including Integrity and Evaluation Guidance (90% Submission)	Within 75 Days of Receipt of NPS Comments
NPS / Peer Review Technical Review No. 3 (30 days)	60 Days
Submit Revised Final Historic Context Study (100% Submission)	Within 30 Days of Receipt of NPS Comments
Submit All Supporting Documentation and Editable Files	Within 15 Days of Final Approval
Period of Performance	15 Months

Fee and Payment

Progress payments to the contractor shall be made based on proper and acceptable invoices submitted consistent with the quality requirements described in Stipulation 6 above, according to the following schedule:

DELIVERABLE	PERCENT OF TOTAL FEE
Orientation and Planning Call	Up to 5% of Total
30% Submission (Annotated Outline, Bibliography, and Case Studies)	Up to 25% of Total
60% Submission (Narrative Draft Sections)	Up to 50% of Total
90% Submission (Complete Draft Context Study))	Up to 80% of Total
Final Accepted Historic Context Study and Documentation	Up to 100% of Total

Appendix A - Glossary of NHL Documents

Historic Context Study

A historic context study is a research and analytical document that organizes information around a defined theme, geographic area, and period of significance in order to explain patterns of development and provide the political, social, cultural, and economic background necessary to understand a particular idea, event, movement, or individual. By placing historic events and associated properties within this framework, the study enables evaluation of whether those properties are representative, exceptional, or influential within their historical setting. Such studies establish the framework used to assess relative national significance and support landmark evaluation and documentation. A historic context study may provide the analytical foundation upon which a future theme study is built.

National Historic Landmark (NHL)

National Historic Landmarks are nationally significant historic places designated by the Secretary of the Interior because they possess exceptional value in illustrating, interpreting, or commemorating the history of the United States. Acknowledged to be among the nation's most important historic places, these buildings, sites, structures, objects, and districts adeptly communicate nationally significant themes and contexts in history, archeology, architecture, engineering, and culture. The NPS is the nominating authority for NHLs and the designation process is administered by the NHL Program. Nominations may be initiated by Federal agencies, State Historic Preservation Officers, Tribal Historic Preservation Officers, local governments, private property owners, scholars, and other interested organizations, and are prepared in consultation with the NHL program staff. Proposed designations are evaluated through a rigorous process that includes review by the National Park System Advisory Board, and final designation by the Secretary of the Interior. All NHLs are automatically listed in the National Register of Historic Places upon designation.

National Register of Historic Places

The National Register is the nation's official list of districts, sites, buildings, structures, and objects in both public and private ownership that are significant in American history, architecture, archeology, engineering, and culture. National Register properties have significance to the history of their community, state, or the nation. Nominations for listing historic properties come from State Historic Preservation Officers, from Federal Preservation Officers for properties owned or controlled by the United States Government, and from Tribal Historic Preservation Officers for properties on Tribal lands. Private individuals and organizations, local governments, and American Indian tribes often initiate this process and prepare the necessary documentation. A professional review board in each state considers each property proposed for listing and makes a recommendation on its eligibility. National Historic Landmarks are a separate designation, but upon designation, NHLs are listed in the National Register of Historic Places if not already listed.

Theme Study

A National Historic Landmark theme study is a substantial research and analytical document that examines a specific topic in American history or prehistory from a national perspective in order to identify and evaluate properties of exceptional national significance. Typically conducted at

the direction of Congress, the Secretary of the Interior, or the Director of the NPS, theme studies provide a contextual framework and comparative analysis of properties associated with a defined historical theme. As described in 36 CFR Part 65.5, potential NHLs are identified primarily through theme studies, which assess the relative significance of related resources nationwide and determine which properties meet NHL criteria. Theme studies incorporate historic context but extend beyond them and frequently result in the nomination of properties for designation and serve as authoritative references for evaluating nationally significant historic places.

Appendix B - Criteria for Evaluating Proposals

The project will be awarded on a best-value basis with technical factors more important than price. The technical factors are equal in importance to each other. The relative strengths, deficiencies, significant weaknesses, and risks supporting the proposal evaluation shall be documented in the Technical Evaluation Board report. Elements within each technical factor are also of equal importance within the factor.

1. Understanding of the Requirement: Sound and thorough understanding of the work to be performed, issues to be addressed, and problems that may be encountered.

2. Technical Approach:
    - Appropriateness and completeness of methods and procedures.
    - Schedules, including sequencing and duration of various phases, and allocation of time among project activities.
    - Allotment of time among team members, including but not limited to key personnel defined for undertaking the documentary research, field investigation, analysis, and report preparation and editing.

3. Professional experience of key personnel in undertaking the identification and evaluation of architecturally and historically significant resources of similar magnitude, significance, and complexity. Resumes of project team members, examples of similar projects, and references should be provided for purposes of evaluation.

4. Management Capabilities and Organization of the firm as it relates to the ability to assemble multi-disciplinary teams and to meet the graphic and other technical requirements of the work.

5. Demonstrated Past Performance: Provide contact information (owner's name, contact, and telephone number) and description for 3-5 similar projects completed within the last five years.

The SOW is understood to be unchanged except as proposed under Stipulations and Exclusions. Please include any Stipulations to add detail to the SOW, for example, provide detail on the research approach to the project. Please address any Exclusions to identify work within the SOW that is proposed to be excluded and explain the impact on the project.

Project fees must include the entire scope of work and the final report as delivered, including tasks and subtasks. Fees shown shall include all costs and expenses (copying, mileage, photographs, testing and laboratory services, etc.) needed to complete the scope of work.