

April 12, 2018

Announcement: Request for Proposals for Prospect Research Coordinator

The Smithsonian Institution (SI) National Museum of African American History and Culture (NMAAHC) Office of Strategic Partnerships (OSP) establishes partnerships on behalf of the Museum focused on organizational capacity building and museum professional development within organizations promoting the study or appreciation of African American and African Diaspora life, art, history, or culture and professional networked entities that have broad reach to institutions and individuals across a large geographic area. Those groups are classified according to museum strategic priorities—Intra-Smithsonian, Washington, DC metro area, state/regional, international.

NMAAHC is seeking services of a qualified Prospect Research Coordinator (Contractor) to provide professional, technical, and non-personal event coordination services for the Office of Strategic Partnerships. The Contractor is not an employee of Smithsonian Institution.

If you are interested in submitting a proposal, please carefully review the attached documents and adhere to the instructions for submission. For more information about the NMAAHC Office of Strategic Partnerships, please visit: <https://nmaahc.si.edu/connect/osp>.

Proposals are due before 11:59 p.m. on Monday April 30, 2018. All proposals should be submitted to the attention of Auntaneshia Staveloz at StavelozA@si.edu.

Attached:

- Request for Quote
- Statement of Work
- Quote Submission Form
- OCON-120, Notice of Mandatory Registration in the System for Award Management
- Form SI-147A, Smithsonian Institution Purchase Order Terms and Conditions
- Smithsonian Institution Independent Contractor Clause
- Smithsonian Institution Rights in Data Clause
- Smithsonian Institution Confidentiality Clause

**Smithsonian Institution
National Museum of African American History and Culture**

**REQUEST FOR QUOTE FOR
TECHNICAL OR PROFESSIONAL, NON-PERSONAL SERVICES FOR
Prospect Research Coordination Services**

This Request for Quote (RFQ) is issued by the Office of Strategic Partnerships at the National Museum of African American History and Culture (NMAAHC) at the Smithsonian Institution (SI), for technical professional, non-personal Prospect Research Coordination Services in accordance with the Statement of Work (SOW).

The Smithsonian Institution plans to award based on best value. The Procurement Official intends to award without discussion. However, the Procurement Official reserves the right to seek clarifications if determined necessary.

The Smithsonian does NOT encourage overly elaborate written technical materials. The technical quote should be written so that the Offeror's understanding of the Statement of Work may be evaluated. It must disclose the company's technical approach in sufficient enough detail to provide a clear and concise presentation that includes but is not limited to the requirement of the technical proposal criteria/instructions.

The period of performance will be on or about **June 18, 2018 to June 17, 2019**.

I. SUBMITTING YOUR QUOTE

Price quotes are to be submitted by electronic mail (email). Quotes are due on or before 11:59pm on **Monday April 30, 2018**.

Attn: Auntaneshia Staveloz
Email: StavelozA@si.edu

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National Museum of African American History and Culture
600 Maryland Ave. SW, Suite 550E
Washington, DC 20024

It is advisable that quotes and documents included as part of proposal packages that are not sent via email be hand-delivered or submitted via direct package delivery companies to the listed street address.

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Questions or comments pertaining to the RFQ should be submitted via electronic mail (email) to Auntaneshia Staveloz (StavelozA@si.edu) no later than **5:00 PM, Friday April 20, 2018**. All questions with answers having impact on the RFQ will be issued to all vendors via electronic mail (email) by **5:00 p.m. on Tuesday April 24, 2018**.

If you decline to submit a quote, we would appreciate receiving e-mail notification by Friday, April 27, 2018.

II. DESCRIPTION OF REQUIRED SERVICES

The Smithsonian Institution has a requirement for 1,040 hours of prospect research (part-time) coordination services in accordance with the Statement of Work (SOW).

III. TYPE OF CONTRACT

The award will be a Firm-Fixed Price contract. This firm-fixed price shall include all direct and indirect costs necessary to complete the requirements as outlined in the SOW for 1,040 hours of prospect research coordination services to be completed on or about June 17, 2019, with an option to extend contract for up to two option years. All services must be coordinated directly with the Smithsonian Institution's Contracting Officer's Technical Representative (COTR), including mutual approval of all contractor proposed plans of action.

IV. EVALUATION

The Smithsonian Institution plans to award based on "Best Value." "Best Value" will be based on the following factors:

A. Price

The price evaluation will cover the pricing submitted for the base year plus two (2) option years.

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B. Relevant Experience/ Qualifications/Technical Competence/Résumé

The contractor to perform the work will provide a brief narrative summary (NTE 1,000 words) of his/her educational training and/or certifications, and practical knowledge about prospect research coordination services. These services include the ability to provide coordination and insights related to research, analysis and solicitation of funding resources for endowment campaigns, major gifts and special projects funding. The Contractor must have the ability to mobilize both internal and external stakeholders, to include donor base representatives. This experience must be for an organization comparable in size and scope to the National Museum of African American History and Culture, within the last three (3) years. At least 3-5 years of professional experience, particularly in a non-profit, fundraising, development or advancement position in the museum or cultural sector.

The summary will include a minimum of three (3) successfully funded projects to include customers, time frames, contract dollar values, locations of contract performance, and complexity of work. The relevant experience of the contractor to perform the work will be used to facilitate the determination of the capabilities of the contractor to perform the work required in the Statement of Work (SOW).

The contractor to perform the work will have experience in the following areas:

- Prospect research coordination, donor cultivation and fundraising.
- Donor relations and management.
- Donor database management.
- Strong written and verbal communication skills.
- Ability to manage details and follow through.
- Must be highly collaborative.
- Must be an effective team member and team builder.
- Must have a strong customer service orientation.
- Must be highly motivated, dependable, organized, comfortable working in a team setting and a conscientious self-starter.
- Demonstrated success in communicating to and engaging with culturally diverse audiences and stakeholders
- Proven ability to collaborate across divisions to implement processes and achieve results; track record of building and maintaining productive relationships with multiple stakeholders
- Master's degree or equivalent work related experience required, preferably in fundraising, development, or advancement.
- The Contractor shall also have experience with Microsoft Word, MS Outlook for scheduling and calendar management, Adobe Pro, Raiser's Edge, and Excel.

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The contractor to perform the work will also provide the following subsequent materials: (1) a writing sample, (2) list of awarded projects/initiatives, fundraising campaigns, endowment; and (3) a résumé highlighting education, work experience, qualifications, and technical competence that demonstrates the contractor meets the requirements of the SOW.

C. Past Performance

The contractor to perform the work will provide the names and contact information for at least three (3) people who can answer specific questions about the quality, workmanship, and scheduling relating to current or previous experience as a contractor, employee, or intern with providing services comparable to those described in the Statement of Work. The contractor to perform the work will provide the dates for the periods of performance and brief description of the work performed.

The Smithsonian Institution plans to award without discussion, however, does reserve the right to conduct discussions with top two candidates if deemed necessary by the Contracting Officer before making final selection.

Failure to furnish complete information requested in the RFQ may cause the Offeror to be judged non-responsive and immediately be removed from further consideration for this award.

All of the above factors are of equal importance.

V. INTENT TO EXERCISE OPTIONS

The Smithsonian Institution reserves the sole option to extend this purchase order to engage the Contractor in providing similar services for additional one-year periods as stated below. These option periods are subject to: 1) acceptance and approval by the Contracting Officer's Technical Representative during the respective contract period, 2) availability of funds from which payment for contract purposes can be made, and 3) the contract price for

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services to be provided under the optional periods shall be as stated in contractor's amendment.

A written modification will be issued to exercise any options. In the event the Smithsonian exercises its right to extend the period of performance under this contract, all other terms and conditions hereunder shall remain unchanged.

Base - The period of performance for the base effort shall be from about June 18, 2018 to June 17, 2019.

Option 1 - If exercised, the period of performance for this effort shall be from about June 18, 2019 to June 17, 2020.

Option 2 - If exercised, the period of performance for this effort shall be from about June 18, 2020 to June 17, 2021.

VI. INSURANCE REQUIREMENTS

Prospective contractors are required to have *General Liability Insurance*. The SI must be listed as additional insured for the contractor's General Liability insurance or the contractor may obtain insurance through the Smithsonian Institution. Proof of insurance, or a statement of intent to obtain insurance in advance of the period of performance, must be submitted with quotes. Work may not begin without proof of insurance.

VII. DUNS NUMBER

A DUNS number is a unique nine digit identification number available for each physical location of your business and is needed to register in the System for Award Management (SAM), formerly the Central Contractor Registration (CCR) system (see Section VIII of this RFQ). DUNS numbers are provided through Dun and Bradstreet (D&B) at no charge when you contact D&B via toll free telephone call to 1-866-705-5711, or on the internet at <http://fedgov.dnb.com/webform>. Non-U.S. (international) vendors may also contact D&B via email at help@dnb.com. Indicate that you are requesting a DUNS number to assist with eligibility for U.S. Government contracts. New DUNS numbers for U.S. vendors will be active and available for SAM registration within 1-2 business days of request; international vendors DUNS will be active and available normally within 2-5 days of request.

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VIII. SYSTEM FOR AWARD MANAGEMENT (SAM) REGISTRATION (formerly CCR)

It is a requirement that current and prospective recipients of contract and purchase orders awarded by the SI must complete registration and maintain an active record in the System for Award Management (SAM). The SAM requires a one-time business registration, with annual updates, and allows vendors to control the accuracy of the business information they enter. The financial data you enter, which includes the electronic funds transfer (EFT) data collected by SAM, will assist the SI in paying your invoices and complying with the Federal Debt Collection Improvement Act of 1996. You may complete or update your information in SAM online at <http://sam.gov>. Questions regarding the process may be directed to the Federal Service Desk online at www.fsd.gov or via toll free call to 1-888-606-8220. There is no charge for registering in SAM.

For vendors who were registered in CCR prior to July 30, 2012, this means:

- All information in CCR was transferred to SAM and available for viewing and updating on July 30, 2012;
- Vendors will not have to re-register in SAM if their CCR was active and valid on July 30, 2012, however,
 - They will have to set up a SAM user ID. Once this is done, the vendors will have access to all their information and may edit it as needed,
 - They may set up an ID when they are notified by the SAM that it is time to renew registration.
- Vendors who attempted to access their information by going to the current CCR website on and after July 30, 2012, should have been automatically redirected to SAM.

For vendors who were not registered in CCR prior to July 30, 2012, this means:

- Vendors will need to obtain a DUNS number (see Part V. above) in order to register in SAM.
- Beginning on July 30, 2012, they must be directed to <http://sam.gov> to complete registration in SAM.
- The registration process via SAM has been changed for SAM, and is reported to be streamlined and much easier than the CCR process.

If yours is the acceptable price quote and you are selected for award, your organization's valid and active registration with SAM must be verifiable by SI staff administering this

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Procurement prior to contract or purchase order award, and at the time any modifications or amendments to awards might be required.

IX. LEGISLATIVE AND/OR ADMINISTRATIVE REQUIREMENTS

A. Service Contract Act of 1965, as amended

If services to be performed are covered by the Service Contract Act (SCA), as amended, the SCA shall apply to all work performed under the contract, purchase order, or GSA schedule task order to be issued. Individuals and companies submitting quotes are encouraged to verify the wages and fringe benefits determined by the U.S. Department of Labor to be payable for the Labor Category and in within the location that work performance will occur as cited in the Statement of Work. The SCA wages and fringe benefits payable shall be part of the order award.

Individuals and companies awarded a contract, purchase order or GSA schedule contract task order for SCA covered services are responsible, and required by law, to deliver to its employee(s) or post a notice of the required compensation in a prominent place at the worksite. The SCA provides authority to contracting agencies to withhold contract funds to reimburse underpaid employees, terminate the contract, hold the contractor liable for associated costs to the government, and debar from future government contracts for a period of three (3) years any persons or firms who have violated the SCA. The contracting officer awarding this order, or the Smithsonian Inspector General, may periodically require contractors to provide information that verifies compliance with the SCA for services provided under the awarded contracts, purchase orders or GSA schedule contract task orders.

B. E-Verify

If at award, or anytime during contract performance, the dollar amount of the contract award exceeds \$150,000 or \$5,000,000 under GSA Schedule, with a period of performance over 120 days, the successful bidder is required to register in the E-Verify System and verify that all individuals to be hired under the contract award are eligible for employment within the U.S. This requirement is not applicable to work that will be performed outside the U.S. or for Commercial Off the Shelf (COTS) items.

E-Verify is an Internet-based system operated by the Department of Homeland Security (DHS), U.S. Citizenship and Immigration Services (USCIS). It allows employers

to verify the employment eligibility of their employees, regardless of citizenship. For more information on e-verify and when, why and how to register and use the system please go to the USCIS site on the World Wide Web at:

<http://www.uscis.gov/portal/site/uscis/menuitem.5af9bb95919f35e66f614176543f6d1a/?vgnnextoid=cb2a535e0869d110VgnVCM1000004718190aRCD&vgnnextchannel=75bce2e261405110VgnVCM1000004718190aRCRD>

Executive Order 13465 and Homeland Security Policy Directive 12 (HSPD-12)

C. Background Investigations

If a contractor employee assigned to the SI under this contract will have an association with SI that will be greater than thirty (30) days, determined either at time of contract award or anytime during contract performance, and will need access to staff-only areas of SI controlled facilities and leased spaces, the employee shall be required to receive an SI Credential. Contractor employees who require an SI Credential shall be required to undergo and pass an appropriate background investigation and complete security awareness training before an SI Credential is issued. Employees whose associations with the SI will be less than 30 days shall not receive a background investigation or SI Credential, however, they must be escorted by Credentialed personnel at all times when in staff-only areas of SI facilities. If relevant to this RFQ, a form OCon 520, Background Investigations and Credentials for Contractor Personnel, may be included. The following actions shall be required to be completed by the SI Contracting Officer's Technical Representative (COTR) and successful vendor:

1. The COTR shall provide an OF-306, Declaration for Federal Employment form, for each of the Contractor's employees who will be assigned to the SI for 30 days or longer. The OF-306 forms must be completed by each person and returned by the Contractor to the COTR, or other designated SI employee, within ten (10) workdays from receipt of the forms by the Contractor.
2. For contractors to SI organizations outside the Washington DC and New York City areas, forms SF-87, Fingerprint Cards, shall be provided to the Contractor by the COTR or other designated SI employee. Each form SF-87 must be returned to the COTR, or other designated SI employee, within ten (10) workdays from receipt of the forms by the Contractor. When necessary, the forms SF-87 shall be submitted by the Contractor with the OF-306.

X. INFORMATION TO BE SUBMITTED WITH QUOTES

Quotes submitted must include:

- A. Completed Quote Submission Form**
- B. Résumé**
- C. Writing Sample**
- D. Record of Awarded Funds—Programs, Endowment, Major Gifts**
- E. Certificates or other documentation confirming insurance (if applicable)**
- F. References**

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Introduction

The Smithsonian Institution (SI) National Museum of African American History and Culture (NMAAHC) Office of Strategic Partnerships (OSP) establishes partnerships on behalf of the Museum focused on organizational capacity building and museum professional development within organizations promoting the study or appreciation of African American and African Diaspora life, art, history, or culture and professional networked entities that have broad reach to institutions and individuals across a large geographic area. Those groups are classified according to museum strategic priorities—Intra-Smithsonian, Washington, DC metro area, state/regional, international. For more information about the NMAAHC Office of Strategic Partnerships, please visit: <https://nmaahc.si.edu/connect/osp>.

NMAAHC is seeking services of a qualified Prospect Research Coordinator (Contractor) to provide professional, technical, and non-personal event coordination services for the Office of Strategic Partnerships. The Contractor is not an employee of Smithsonian Institution.

Scope of Work

The Contractor shall work to perform services related to identifying, researching and analyzing prospects for major gift discovery, cultivation and solicitation to support programs and initiatives of the Office of Strategic Partnerships at the National Museum of African American History and Culture between June 18, 2018 and June 17, 2019. The project will take place over the period of performance primarily from a remote location of the Contractor's choosing and at Capital Gallery, 600 Maryland Ave. SW, Washington, DC 20024 as appropriate. Work will be scheduled at mutually convenient times for the contractor and the Contracting Officer's Technical Representative (COTR). Capital Gallery is accessible by public transportation.

Statement of Work

The Prospect Research Coordinator will be responsible for identifying, collaborating, and presenting prospects to OSP Senior leadership for further cultivation related to opportunities appropriate for funding projects and initiatives and/or building endowment for the work of the Office of Strategic Partnerships. The Coordinator reports to the Supervisory Program Manager for timely prospect follow up and data capture. The research efforts are for a single department within the museum only and is not towards museum-wide fundraising and/or Capital Campaign efforts. The work of the Contractor is to occur in stages with a large portion of the first year dedicated to research and prospecting on field-wide standards for funding opportunities based on the nature of the work within the Office of Strategic Partnerships at the National Museum of African American History and Culture.

The Contractor shall use their own methods and subject matter expertise to provide the following services and deliverables:

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Research and Analysis

- Accrues a working knowledge of the Office of Strategic Partnerships through review of department reports, review of all programs and initiatives.
- Conducts research on understanding the mission of the Office of Strategic Partnerships and its comparable entities within the broader museum field and other similar cultural or educational entities.
- Identifies and profiles individuals, corporate, and foundation donors, and researches Prospects for endowed gifts, special project funding, and annual/sustained support.
- Creates an electronic tracking form, amassing a list of funding entities with history and practice of funding programs aligned with the work of the Office of Strategic Partnerships.
- Prepares data analysis and reports of research findings. Identifies and ranks new prospects using a broad range of internal and external data sources.
- Provides written reports about specific donors and prospects, containing an analysis of information gathered from public sources. Constructs and distributes in-depth profiles, confidential briefing documents, and other research materials using multiple screening strategies and methodologies.
- Analyzes data to recommend prospects to solicit.
- Shares research findings on a regular pre-determined schedule (e.g. bi-weekly, monthly, etc.).
- Maintains an ongoing list of possible prospects for the Office of Strategic Partnerships and monitor prospect moves and goals.
- Schedule and participate in prospect and review meetings and prospect strategy discussions with OSP senior leadership.
- Generate reports on research findings and recommendations for future steps
- Work with OSP leadership to assist in writing grants and/or solicitations requiring timely submission related to current year programming.
- Assist OSP leadership in the development of prospectus materials for future use with potential funders to include a case statement.

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- Devise framework and/or strategy on how to plan for endowment.

Professional Relations and Engagement

- Communicate in writing or phone with senior level professionals regarding prospects and potential funding opportunities and relationships.
- Participates in meetings with leading partners of the Office of Strategic Partnerships.
- Assists in formulating OSP procedures and standards governing prospect research in compliance with Smithsonian regulations. Advises and presents on recommendations of how to apply policy and procedures.
- Conducts work in compliance with Smithsonian standards and protocols.

Performance Standards

- A The Contractor shall comply with all Smithsonian rules and regulations applicable to performance under this contract.
- B The Contractor shall work cooperatively and professionally with NMAAHC staff, contractors, and volunteers.
- C The Contractor shall bring any concerns or questions to the attention of the COTR or their assigned individuals.

Period of Performance

- A. The work shall proceed upon the completion of a signed purchase order, commencing on or around **June 18, 2018 and finishing no later than June 17, 2019**. This effort is approximately **part-time, not to exceed 1,040 hours of work total**.
- B. The NMAAHC, in agreement with the Contractor, may exercise the option to extend the contract for two (2) optional 12-month option periods, running from June 18, 2019 to June 17, 2021.
- C. The specific work schedule will be determined by mutual agreement between the COTR and the Contractor.

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Smithsonian Furnished Property

- A. The NMAAHC shall provide the following:
 - a. Descriptions of OSP projects, lists of partners, and summaries of departmental goals and priorities.
 - b. NMAAHC and SI strategic plan and framework.
 - c. Access to NMAAHC offices at Capital Gallery as needed, to include computer equipment, desk and access to NMAAHC printers.
 - d. Remote access credentialing as appropriate (e.g. Citrix, etc.).
- B. Smithsonian Property Responsibilities. The Contractor assumes full responsibility for and shall reimburse and indemnify the Smithsonian for any loss or damage to Smithsonian property in Contractor's custody ad care—due to Contractor negligence or omission.

Invoicing and Payment Schedule

The Contractor shall invoice the Smithsonian on a prorated, hourly basis derived from the firm-fixed price award every two weeks until the award is used up or until the end of the period of performance, whichever comes first. The Contractor will submit with the invoice, a timesheet listing hours worked and a summary of services performed during the pay period. The Contractor shall submit the invoice and supporting documentation to the Contracting Officer's Technical Representative (COTR). Billing is for hours worked and does not include lunch or breaks.

The Contractor shall submit all required work to the Contracting Officer's Technical Representative (COTR) for acceptance and approval.

Invoices are to be submitted to the attention of Auntaneshia Staveloz (StavelozA@si.edu) the Contracting Officer's Technical Representative (COTR) and NMAAHC Supervisory Program Manager.

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Delegation of Contracting Officer's Technical Representative

The COTR shall act for and on behalf of the Contracting Officer in the administration of this contract with respect to:

1. Resolution of issues that may arise between the Contactor and the Smithsonian in connection with such matters as acceptability of work and satisfactory performance.
2. Evaluation on an overall basis of acceptability of work, compliance with standards, and satisfactory performance.
3. Acceptance of all work performed under the contract and approval of all invoices.
4. The Contractor shall make available such records, reports, and facilities as may be required by the named individual to effectively and efficiently fulfill COTR duties and responsibilities.
5. This delegation of authority does not authorize the named individual to modify any of the contract clauses, provisions, terms, or conditions of this contract. All authorities not herein delegated are retained and shall be executed only by the contracting officer.