

Golden Valley Historical Society Request for Proposals (RFP)

Services: Professional facilitation

Project: The [Golden Valley Historical Society](#) (GVHS) seeks to contract a qualified facilitator to conduct a [Standards and Excellence Program for History Organizations \(STEPS\)](#) assessment and develop a prioritized workplan in collaboration with the GVHS Board of Directors and volunteers.

Closing Date: Wednesday, April 6 at 11:59pm Central Time

Primary Contact: Crystal Boyd
Project Manager
(612) 247-5283
crystalboydconsulting@gmail.com

1. Purpose

The primary goal of this project is to assist GVHS with evaluating its awareness and achievement of national standards for history organizations. The project shall:

- 1) Assess GVHS operations, policies, and procedures by completing the STEPS assessment;
- 2) Identify gaps and goals in national standards that GVHS wishes to address;
- 3) Develop a prioritized workplan for GVHS;
- 4) Educate the Board of Directors and volunteers about national standards for history organizations and museums.

This RFP describes the basic services required and the process for selecting the qualified contractor or consulting firm for this project (hereafter “contractor”). Women and minorities are encouraged to apply.

2. Submission of Proposal

Prospective contractors shall submit one (1) electronic copy of their proposal and fee schedule no later than 11:59pm Central Time on Wednesday, April 6, 2022 to

crystalboydconsulting@gmail.com. All proposals must be clearly marked "GVHS – STEPS Assessment" in the subject heading.

All submissions must be received by the RFP closing date. Incomplete submissions and submissions received after the closing date will not be accepted.

3. Background Information

The Golden Valley Historical Society (GVHS) was organized in 1974. Its mission is to find, preserve, and disseminate historical knowledge about the city of Golden Valley, Minnesota. In pursuit of this mission, GVHS collects oral histories, written documents, photographs, video histories, and three-dimensional objects. GVHS is an all-volunteer organization that manages a collection of 1,900 archival records and 570 three-dimensional objects. The collections are stored in the oldest church building in Golden Valley, which was built in 1882.

In 1997, GVHS acquired the city's oldest church as a permanent home. In 2012, the GVHS Board of Directors and membership began fundraising to build an addition to house permanent and rotating exhibitions, object storage, and office space. Construction began in late 2013 and was completed in mid-2014. The first permanent museum exhibit opened in fall 2018.

GVHS is now pursuing a series of grants and other projects that will raise its profile among people who live, work, and play in Golden Valley. In 2016, GVHS developed its Collections Management Policies and Procedures. In 2017, it conducted a full collections inventory and developed a Conservation Assessment and Long Range Preservation Plan. In 2019, GVHS completed cataloging its archives and three-dimensional objects. It also began transferring database records from PastPerfect to Collective Access and updating its website. In 2021, GVHS developed a Disaster Plan.

GVHS now seeks to complete a STEPS assessment and develop a prioritized workplan. This process will help to ensure that GVHS meets national standards for history organizations.

4. Scope of Services

GVHS seeks to contract a qualified facilitator to conduct a STEPS assessment and develop a prioritized workplan for GVHS. The contractor will work closely with the GVHS Board of Directors and volunteers.

The contractor shall:

- Host 1 kickoff meeting with GVHS Board (July 2022).

- Host at least 6 meetings with the GVHS Board and volunteers to conduct the STEPS assessment (August 2022 – March 2023, most likely skipping December 2022).
- Provide all materials and supplies needed for project completion, including printing STEPS workbooks for each Board member (approx. 290 pages/workbook for 12 participants).
- Develop a prioritized workplan, including 1 round of revisions with the GVHS Board.
- Host at least 2 meetings with the GVHS Board and volunteers to develop and review a prioritized workplan (April – May 2023).
- Collaborate with the GVHS newsletter editor to write 1 newsletter article and 1 Facebook post.
- Give 1 close-out presentation to the GVHS Board (June 2023).
- Submit 1 final report summarizing project activities and findings.
- Coordinate with the GVHS project manager throughout the project as needed.
- Note: This project may be funded in part through a Minnesota Historical and Cultural Heritage Grant and must be carried out in accordance with the provisions outlined by the [Minnesota Historical and Cultural Heritage Grants Manual](#).
- Note: Some meetings may be virtual, as agreed upon during the kickoff meeting.

The contractor shall submit the following deliverables:

- Completed STEPS workbook (.pdf file)
- Prioritized workplan (.doc file)
- 1 newsletter article
- 1 Facebook post
- Final report summarizing project activities and findings

Individuals hired for this work are considered contractors and not GVHS employees. No sick leave, vacation, or medical benefits are provided for this work. Contracted individuals will be responsible for their own state and federal income taxes.

5. Required Knowledge, Skills, and Abilities

The selected contractor shall possess the following qualifications:

- Minimum of B.A. in History, Museum Studies, Nonprofit Management, or related fields.
- Experience conducting STEPS assessments (preferred) or strategic planning.
- Experience working with small, all-volunteer history organizations.
- Background knowledge of Minnesota history.
- Ability to travel to GVHS and/or the necessary equipment to host virtual meetings.
- Ability to organize project records and meet deadlines.
- Skill in managing, leading, communicating, and collaborating with a wide range of stakeholders to accomplish project goals.
- Excellent oral and written communication skills.

6. Project Timeline

| Date | Activity |
|---|--|
| Thursday March 31, 2022 | RFP issued |
| Wednesday April 6 at 11:59pm Central Time | RFP responses due |
| Friday April 8, 2022 | Estimated contract award |
| Friday July 1, 2022 | Project start date, dependent on funding |
| June 30, 2023 | Estimated project end date |

Proposals will be evaluated within a maximum of two weeks after RFP responses are due. Bidders will be notified of their status as soon as possible thereafter.

7. Proposals

Minimum Proposal Contents

Proposals from qualified contractors shall include, at a minimum, the following sections:

1. Project Understanding and Approach

- Describe project understanding and identify the approach to fulfill the scope of services and deliverable requirements.

2. Similar Project Experience

- Identify similar project experience within the last 3-5 years.
- Provide a reference and contact information for each project described above.
- Submitted projects shall represent work of the proposed contractor or consulting team and not just that of the firm, if applicable.
- By submitting a response to this RFP, the respondent hereby authorizes GVHS to contact references and make such further investigations as may be in the best interest of the organization.

3. Contractor Profile, Team, and Project Manager Qualifications

- Submit a contractor or consulting firm profile and identify a project manager, work performed on similar projects, and project manager qualifications.
- Identify additional team members, including subcontractors if required, and their previous experience, qualifications, and training details.
- Identify where bidder personnel and subcontractors are located.
- The contractor is encouraged to use minority- and women-owned businesses in the implementation of the scope to the fullest extent possible.

4. Schedule and Work Plan

- Identify the key work tasks, milestones, and critical path based upon GVHS's proposed project completion date of June 30, 2023.

- Any proposals that describe work beyond GVHS's preferred project completion date must provide clear justification for the scheduling overage.

5. Fee

- Identify total fee to complete described work with a breakdown of tasks, estimated hours, and hourly rates.
- The fee shall be structured "hourly-not-to-exceed" unless an alternative fee structure is proposed as appropriate.
- Costs for each phase of service shall be individually delineated.
- Include the following items in the proposed budget, if applicable: travel costs, print services, mailing costs, supply costs if any, etc. The total fee shall reflect all costs, included but not limited to, subcontractors/consultants, meeting allowance, specified deliverables, overhead, profit, and reimbursable.
- Also include estimated costs for materials in the fee proposal under reimbursable expenses. As appropriate, the contractor shall include the cost for coordinating purchases and receipt of materials in the fee proposal.
- Please note that indirect/overhead is not an allowable expense under the terms of the Arts and Cultural Heritage Grant, so GVHS is unable to cover this line item.

Conditions on Receipt of Proposals

This RFP does not obligate GVHS to award any specific project. GVHS reserves the right to cancel this solicitation or to change its scope if doing so would be in the best interests of GVHS. GVHS also reserves the right to waive irregularities in proposal content or to request supplemental information from prospective bidder(s). All documents included in this package do not constitute a legal offer. A legally binding contract will not be formed until all parties involved have fully executed a written contract that incorporates all mutually agreed-upon instructions, specifications, conditions, and fees.

8. Proposal Evaluation and Selection Process

1. Shortly after the submission deadline, a selection committee comprised of the GVHS Board will review all proposals. At its discretion, GVHS may elect to conduct interviews with prospective contractors as part of the selection process.
2. GVHS will evaluate proposals based on the following criteria:
 - a. Project understanding and approach
 - b. Previous experience with similar projects
 - c. Bidder and sub-contractor qualification, technical expertise, knowledge, and experience
 - d. Schedule and Work Plan
 - e. Fee
 - f. Any other factor(s) that might aid in selecting the best candidate.

3. Upon approval by GVHS, the successful candidate will be notified and a contractor agreement will be finalized. Unsuccessful candidates will be notified after the contractor agreement has been executed.
4. GVHS reserves the right to cancel the RFP at any time, or for any reason that is in the best interests of the organization. GVHS also reserves the right to reject proposals based on the evaluation of submitted materials, to accept other than the lowest cost proposal, and to negotiate the specified dollar amount or any portion thereof.
5. The selection of the successful bidder is not based solely on low bid, but on the candidate that will best accomplish the objectives of the project.

9. Delivery Schedule

The production schedule will be determined at project start-up, on a schedule mutually agreed to by the successful bidder and GVHS. The anticipated project completion date is June 30, 2023. Please note that funding may be provided by the Minnesota Historical and Cultural Heritage Grants program, which may restrict GVHS's ability to approve an extension on the project end date.

10. Anticipated Budget

Proposals shall not exceed \$9,700. The consulting firm is expected to include the following items in its proposed budget: travel costs, print services, mailing costs, supply costs if any, etc.

GVHS anticipates that it will provide approximately \$2,475 as in-kind match from 87 hours of volunteer work.

Support for this project may be provided by the Minnesota Historical and Cultural Heritage Grants program of the Arts and Cultural Heritage Fund, created by the Clean Water, Land, & Legacy Amendment. Status of the GVHS grant proposal is expected in mid-June 2022.

11. Contact

Questions regarding this RFP or the associated project should be directed to:

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(612) 247-5283
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