

VALDEZ MUSEUM & HISTORICAL ARCHIVE ASSOCIATION, INC.

MEETING OF THE MUSEUM BUILDING COMMITTEE
April 9 2015 - Meeting Time 5:30 pm – Main Museum 217 Egan Drive

Purpose of Committee

The Building Committee has been authorized by and is accountable to the VMFLA Board of Director to coordinate all issues as it relate to the expansion of the facilities of the Valdez Museum.

1. Call to Order/Roll Call
2. Introduction of Guests
3. Public Business from the Floor
4. Approval of Building Committee Minutes from March 12, 2015 (pg. 2)
5. Committee Chair Report
6. Old Business
 - a) Stakeholder Influence Matrix
 - b) Draft RFP for Master Interpretive Planning Consultant (pg. 4)
7. New Business
 - a) Next Step(s)
 - i. Development & Approval of Project Charter
 - b) Timeline for Pre Development Planning
8. Committee Business from the Floor
9.

Next Meeting: May 14, 2015 – 5:30 p.m.

10. Adjournment



Valdez Museum & Historical Archive Association, Inc.

**Minutes of Building Committee
February 12, 2015 – 5:30 pm at the Valdez Museum**

- 1. Call to Order/Roll Call** Mrs. Relay called the meeting to order at 5:30 p.m.
Members present: Julie Farrell, Lisa Von Bargen, Emmie Swanson, John Hozey, and Dick Smith
Members excused: Michelle Cullen, and Tom McAlister
Members unexcused: None
Staff present: Patricia Relay, Andrew Goldstein, Faith Revell, and Brittany Cabello
- 2. Purpose of Meeting:** Mrs. Relay welcomed all for attending and invited attendees to go around the table to introduce themselves and to share a little about what they thought their role on the committee would be. After introductions were completed, Relay outlined the goals of the meeting. As this is the first meeting of the Building Committee, overall this is an organizational meeting to review the Committee's job description, to appoint a Committee Chair and to discuss the Pre Planning process.
- 3. Committee Job Description / Committee Chair:** The Committee Job Description was approved as presented. All members in attendance signed and submitted their acknowledgment of the description. Ms. Von Bargen volunteered to Chair the Committee. She felt that her dual role as both a Board member and a City representative would suit the role fine. Mrs. Farrell agreed to serve as Vice Chair.
- 4. Pre Planning:** What is Pre Planning? Mrs. Relay shared a handout on planning for capital projects. This was a webinar that she and Mrs. Cullen attended last fall. Relay drew the attention of the Committee to the sections that focus on the Pre Development phase of the project. Mr. Goldstein questioned a graph that visually depicts the Benefits of Pre Development. Ms. Von Bargen shared that the graph indicates that the Pre Development stage is where the biggest changes occur and as the process continues, fewer changes are feasible.

Mrs. Relay conveyed that, for museum, this is a time to craft a solid Master Interpretive Plan. This is a round map to the entire visitor experience. It is a time for visioning and clearly articulating the Museum's program of work. Mr. Hozey compared this plan to the Middle School Project whereby that project started with an Education Specification Plan. Ms. Von Bargen inquired if Museum staff were qualified for engaging in this planning process and if not, if there were funds to hire an outside consultant. Mrs. Relay reported that indeed the Museum staff is qualified, but if staff were tasked with the Master Interpretive Planning process there would be no time for staff to complete the Museum's mission driven programs. Mrs. Relay then queried Mr. Hozey about the \$15,000 that the Council approved last summer. Relay wondered

if those funds are still available. Ms. Von Barga interjected and stated that those funds are still in the Council's reserve fund. Mr. Hozey convey as long as the Museum would agree to match those funds then the City would agree to release them. Mrs. Relay reported that the Museum Board is scheduled to adopt an amended 2015 operating budget that releases \$15,000 from reserve funds to meet that match. All agreed to the recruitment of a Master Interpretive Planning consultant. Ms. Von Barga stated that since this project includes the City as the primary partner, a RFP should be sent out to qualified firms. Mr. Goldstein agreed to draft a proposed RFP for the committee to review at the next meeting.

5. **Moving Forward:** Further discussion was made on the importance of this Committee's transparency to the community. Mr. Hozey and Ms. Von Barga inquired about what the process would be for engaging the community? Mrs. Relay and Mrs. Cabello stated that the Museum website would include a page on the Museum's website dedicated to activities of the committee. The page could then be linked to the City's website. Both Hozey and Von Barga wanted to be sure that the Committee's meetings were publicized well in advance with an Agenda that includes an opportunity to public comments. Ms. Revell was concerned that Public comments are premature. Hozey stated that the public could be in the audience but would not be members of the committee. Relay stated that publicizing the meeting in advance would be no trouble and including Public Appearance on the agenda will be included.

Ms. Von Barga suggested the following items for the next meeting:

- a. Stakeholder identification
 - b. Timeline development
 - c. RFP for Master Interpretive Planning consultant review.
6. **Next Meeting:** Building Committee meetings recur monthly on the 2nd Thursday of every month at the Valdez Museum, 5:30 pm. **Unless otherwise posted, March 12, 2015**
 7. **Adjourn:** With no further business before the Committee, Mrs. Relay adjourned the meeting at 6:30 pm

**REQUEST FOR PROPOSALS
FACILITY PLANNING SERVICES**

DUE: XXX

5:00 PM

Deliver to:

Valdez Museum & Historical Archive

P.O. Box 8

Valdez, AK 99686

VALDEZ MUSEUM ~~&-and~~ HISTORICAL ARCHIVE, INC.

NOTICE FOR PROPOSALS

MUSEUM FACILITY PLANNING SERVICES

NOTICE IS HEREBY GIVEN that proposals for Museum Facility Planning Services will be received by the Valdez Museum & Historical Archive, Inc. Proposals will be accepted ~~ONLY~~ only at the office of the Valdez Museum, P.O. Box 8, 217 Egan Drive, Valdez Alaska 99686, until 5:00 p.m., [date], 2015. Said proposals will be evaluated and results will be made public after completion of the negotiation process with the selected consultant. ~~The Museum reserves the right to reject any or all proposals and to waive any informalities or irregularities in any proposal or in the proposal process.~~

Patricia Relay
Executive Director
Valdez Museum ~~&-and~~ Historical Archive

Date

Museum Facility Planning Services

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1.0 INTRODUCTION

The Valdez Museum and Historical Archive, Inc. (hereinafter "VMHA"), is soliciting proposals for Museum Facility Planning Services for a new facility to house the Valdez Museum's collections, staff and administration; integrate collections, permanent and temporary exhibition spaces; offer, educational programming and community activities; and provide space, administrative space, visitor for visitor amenities, and other museum functions. This will be a competitive negotiation process. Qualified individuals, firms, contractors, consultants or entities (hereinafter "Consultant[s]"), that meet the requirements set forth in this Request for Proposals (hereinafter "RFP"), and are capable of providing the services requested are encouraged to participate.

1.1 ORGANIZATIONAL OVERVIEW

The Valdez Museum & Historical Archive preserves, presents, and interprets the heritage and culture of Valdez, the Copper River Basin, and Prince William Sound, Alaska. This region is a remarkable place where events of both national and global significance have taken place and continue to resonate. Valdez is a significant (though lesser-known) point of entry for the 1898 gold rush; was the prominent transportation hub linking the Pacific Ocean and the Interior. It is internationally recognized through its association with the Exxon Valdez Oil Spill, World Extreme Skiing, the terminus for the Trans Alaska Pipeline System, and the Good Friday Earthquake of 1964. Native peoples and tradition bearers have subsisted in this same region for years and vigorously work to preserve their culture and way of life. These stories Stories of colonization, cultural identity, sustainable energy, environmental devastation, community resettlement and loss sit at the forefront of national consequence with the potential to raise global consciousness. The museum's charge is to interpret and preserve this history for the community it serves and for visitors from afar, in the best way possible, and ultimately ignite the fire to learn and sustain it.

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Formed in 1996, the VMHA is a private 501c (3) Non-profit-profit organization. Its purpose is to contract with the City of Valdez to manage and operate the Museum with the goals of decreasing dependence on City funding, increasing the Museum's ability to care for and manage the community's heritage materials, and to continue to serve the community of Valdez. The VMHA Board of Directors governs the corporation and is accountable to the voting membership, made up of the members of the Valdez City Council. The membership, in turn, represents the residents of Valdez. The collection remains the property of the City. A non-voting associate membership program that was merged with the Friends of the Museum in 1999 consists of 200 individuals and businesses.

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The VMHA is governed by a 11an eleven- member volunteer Board-board of Directors-directors and staffed with 4-four permanent full time professionals, 2-two permanent part time, 5-five temporary part time employees, and numerous volunteers. Board &-and staff work closely to develop-plansplan strategically, fund-raising-effortsraise funds, develop museum activities, and grow community relationships that strengthen our-desirethe ability to share local history. Though we-have the museum has a small staff, we-it mounts at least four temporary exhibitions each year and offers engaging education programs to multigenerational learners. We-The museum balances preservation of collections with education-interpretation of said items by rotating newly acquired artifacts or those from

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storage into permanent exhibits, ~~restoring items on display over designated time periods to storage~~ and making sensitive materials available for research and publication.

~~Located in the heart of Valdez, Alaska, the~~ VMHA exhibits are located in two buildings ~~at two different sites~~ that are four blocks apart. The main building on Egan Drive offers an overview of ~~our the region's~~ history with stories about the 1898 Gold Rush, Native Culture, aviation, tourism, transportation, the oil industry, and a selection of temporary exhibits. At ~~our the second~~ ~~building and~~ location, known as the Remembering Old Valdez exhibit, ~~we the museum provides~~ a broader interpretation of the period of time surrounding the 1964 Good Friday Earthquake.

Each year, the VMHA serves between 20,000 and 25,000 visitors. ~~Of that Valdez's 3,750 residents, 900 of the museum's visitors~~ are local and regional school children, ~~500 approximately 625~~ participate in multi-generation programs ~~and presentation~~, and 200 ~~are researchers conduct research who access the through accessing the museum's~~ collections and archives.

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1.2 PROJECT BACKGROUND

The Valdez Museum is ~~seeking planning~~ to develop a new facility to accommodate the growth of the institution and the current and future needs of the community. The role of the Consultant is to help construct a ~~Museum-museum Facility-facility Plan-plan~~ that includes ~~planning~~ elements that combine the physical concerns of the institution such as access and operational capacity with mission-oriented concerns such as ~~programming-education education, interpretation~~, collection preservation, and ~~overall~~ visitor experience. The ~~Consultant-consultant~~ will work closely with a project team that includes VMHA staff and ~~Board-board of Directorsdirectors~~, City of Valdez representatives, one or more architects, and community stakeholders.

The Valdez Museum's first interpretive plan was completed in 1999, coinciding with the construction of the museum's Egan Commons wing. ~~Museum-At that time,~~ exhibits were ~~reconfigured thematically, and~~ arranged in a linear chronological format ranging from pre-European contact era, Native cultures through to the Exxon Valdez Oil Spill, ~~which was at the time being commemorated for its ten-year anniversary~~. The configuration of exhibits in the main building also coincided with the opening of the museum's second building, the Remembering Old Valdez Exhibit, which largely interprets the history of Valdez during the years surrounding the 1964 earthquake. The centerpiece to Remembering Old Valdez was and still is a 1:20 scale model of Valdez as it appeared in 1963. Although exhibit content has been refreshed numerous times since the completion of this plan, the exhibit configuration has remained for the most part unchanged.

In 2007, the museum completed ~~Revitalization~~, a long-term renovation project which included, among other things, replacing the museum's outdated halon fire suppression system with a sprinkler system, the installation of an improved HVAC system, creation of a climate-controlled collections storage area with compacting shelving, abatement of the museum's asbestos tile, and aesthetic improvements such as new carpet and a repainting of the walls. With the completion of ~~Revitalization~~, many of the museum's long-standing exhibitions were beginning to show their age, a fact which has been addressed through the refurbishing of text labels and the integration of revised content. Significant to the

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Revitalization project was the opening of a new space within the museum for the interpretation of issues relevant to Valdez's regional Native Alaskan cultures.

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2007 began the museum's investigation into larger scale upgrades for its long-standing exhibits, focusing on the 2009 anniversary of the Exxon Valdez spill. ~~Although due to funding restraints the exhibit was not completed in time for the 20-year anniversary, it~~ was installed in May 2011. Working closely with various stakeholders and the exhibit development firm of André & Associates, the exhibit represents a more contemporary approach to interpretation through the representation of multiple viewpoints and integrated multi-media, and a level of design production that staff feel is representative of ~~the quality which to aspire in the rest of the museum's presentations, a quality standard to guide future exhibitions.~~

~~The museum followed with additional upgrades to its Aviation, Miner's Cabin, and Good Friday Earthquake exhibitions, the latter timed to coincide with 2014's fifty-year anniversary of the event. While planning these upgrades, it became clear that an exhibits plan was needed, for the purpose of strategizing and prioritizing future upgrades, and ensuring better enabling a cohesive aesthetic within the museum learning by visitors.~~ The timely restructuring of museum staff to include a full-time Curator of Education and Public Programs, and current collaborations with the City of Valdez to create off-site interpretation, brought to light the need to include a broader scope within the interpretive plan.

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In 2013-14, the City of Valdez announced plans to demolish the building at 436 South Hazelet Avenue. This building ~~currently houses the Valdez Museum's Remembering Old Valdez Exhibit, curatorial office, and the majority of the museum's collection storage,~~ in addition to housing the workshop and storage spaces for the City's Maintenance and Parks and Recreation Departments, ~~currently houses the Valdez Museum's Remembering Old Valdez Exhibit, curatorial office, and the majority of the museum's collection storage.~~ This, combined with the museum's existing paucity of usable storage and office space at both locations, along with the community's increased demand for greater museum educational opportunities, ~~administrative and public space,~~ has brought about an imperative to develop a new facility.

In the ~~summer of 2014,~~ the City of Valdez pledged matching funds towards the pre-planning process, ~~with the Museum offsetting the remaining funds.~~ The Valdez Museum Board of Directors formed an ~~Advocacy advocacy Committee committee~~ to garner support for the project, and a ~~Building-building Committee committee~~ to investigate options for a new facility. The VMHA is investigating multiple scenarios, including the renovation of an existing building, construction of a new facility on one of several potential sites, or the reconfiguration and restructuring of the museum's existing physical resources. The VMHA seeks to involve the services of a contractor to assist in the development of ~~this a Museum-museum Facility-facility Plan-plan and in doing so,~~ to approach the development project holistically, incorporating interpretive goals and mission with practical needs of infrastructure and a positive visitor experience.

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Moving forward, this plan will provide a road map for coordinating the full scope of the Valdez Museum's activities and ~~laying~~ the groundwork for developing a new facility. By identifying and framing the broad humanities themes which recur within Valdez's history and the museum collections, the museum will be empowered to make its exhibits, programs and educational offerings more relevant to the visitors' experience, while optimizing its functional spaces within a new building and grounds. This plan is intended as a decision-making tool to define the museum's interpretive priorities and to help integrate and revitalize the visitor experience. Among the uses of the ~~Museum-museum Facility-facility~~

~~Plan-plan~~ is ~~coordinating exhibit and integrating exhibit upgrades with~~ educational programming ~~upgrades~~. The plan will take into consideration the needs of its audiences, institutional identity, multiple ways of learning, and institutional parameters such as budget and physical space requirements. The plan will help the museum to meet its vision in a more efficient manner, resulting in a conservation of funding, a more satisfying visitor experience, and a more effective use of time and resources with a minimal impact on museum operations.

~~While it is expected that the Museum Facility Plan resulting from this RFP will deepen current understandings of the major outcomes for community interaction with the VMHA, at minimum, the plan developed under this project should~~Expectations for the museum facility plan include the following goals:

- ~~• Identify interpretive thematic topics and frameworks, and provide guidance on ways in which exhibit themes and programming may connect and be presented.~~
- Maximize available interior and exterior space ~~to incorporate educational themes and utility messages with minimum duplication in content~~for an optimal visitor experience and institutional functionality.
- Reinforce concepts taught in school tours, programs and workshops
- Support both self-directed and facilitated experiences
- Provide hands-on engagement for adults and children alike
- Encourage visitor interaction and dialogue with staff and volunteers to allow deeper exploration of educational content
- Be easily updated – to allow for revisions based on new utility mandates and new technologies
- Be sustainable
- ~~• Identify interpretive thematic topics and frameworks, and provide guidance on ways in which exhibit themes and programming may connect and be presented.~~

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1.3 INSTRUCTIONS

This RFP includes a description of the scope of services, proposal requirements, and instructions for submitting your proposal. Failure to follow these instructions may result in rejection of your proposal.

Direct all inquiries regarding this RFP *in writing via email* to:

Valdez Museum ~~& and~~ Historical Archive
Re: Museum Facility Plan RFP
Attn: Patricia Relay, Executive Director, VMHA
Email: prelay@valdezmuseum.org
(907) 835-2764

*Note section **xx.x** for proposal submission instructions.*

In the event that it becomes necessary to revise any part of this RFP, written addenda will be issued. Any amendment to this RFP is valid only if it is in writing and issued by the VMHA. No oral interpretations or answers shall bind the VMHA unless confirmed by the VMHA in writing.

2.0 TENTATIVE PROJECT SCHEDULE

The following represents the tentative schedule for this RFP. Any change in the scheduled dates for the Deadline for Final Questions or Proposal Submission Deadline will be advertised in the form of an addendum to this RFP. The schedule for the evaluation process and other future dates may be adjusted without notice.

RFP Released April 15, 2015
Deadline for Final Questions..... May 1, 2015
Valdez Museum Responses to Written Questions..... May 8, 2015
Proposal Submission Deadline..... May 12, 2015
Consultant Interviews as needed..... the week of May 25, 2015
Contract Negotiations..... the week of June 8, 2015
Contract Approval by Valdez Museum & Historical Archive..... June 18, 2015
Commencement of Services..... July 1, 2015
Completion of Services..... No later than December 31, 2015

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3.0 SCOPE OF SERVICES

The responsibilities of the ~~interpretive facility~~ planner for this phase of the project, expected to be completed between July 1, 2015 and December 31, 2015 are to:

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1. Review planning documents and goals for the existing museum. (VMHA will compile a file of materials for ~~Consultant-consultant~~ review.)

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2. In coordination with the Valdez Museum, ~~and the~~ City of Valdez, ~~and interview stakeholder groups~~ to document project objectives, educational goals, main interpretive themes and sub-themes, and match mandates to interpretive content in the exhibits and programming over the next five to ten year time horizon. Meetings may be held in person, online, or via teleconference. It is expected that the ~~Consultant-consultant~~ will invest the following amount of time in review meetings:

1. Onsite Advisory Group Meetings – Initial meeting
2. Up to 4 follow up meetings, via teleconference or video conferencing
3. Final presentation meeting

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3. Identify existing museums/visitor centers regionally and nationally that offer interpretation related to the VMHA's content areas for benchmarking/best practice research. The focus of this review is to highlight strong content or interpretive methods. A review of operational structures or funding is outside the scope of this project.

4. Evaluate existing VMHA exhibits for functionality, relevance, messaging and end of life.
5. Produce an ~~Interpretive~~ Interpretive Plan for the VMHA that will inform and guide the design and content of exhibits, programming, public, storage, and administrative space, publications, and interior and exterior signage. The plan shall include considerations for collections storage, and marketing and retail needs. Following an iterative process and periods for review and comment, the consultant should propose a preliminary draft and then incorporate comments to produce a second draft and final ~~master~~ Interpretive Plan.

At a minimum, the Interpretive Plan shall include the following components:

- a) Executive Summary containing major recommendations of the ~~Interpretive~~ Interpretive Plan and desired outcomes for the VMHA.
 - b) Interpretive goals and objectives ~~(to include learning objectives, behavioral objectives, and emotional objectives)~~ and how they tie to the VMHA's existing ~~Mission~~ Mission and Vision statements.
 - c) Overall interpretive direction, unifying thematic statement, primary themes, and supporting themes.
 - d) Summary of best practice benchmarks.
 - e) Conceptual interior and exterior exhibit plan, to be presented through an interpretive story board, visitor experience narrative, or other similar method. Special attention should be paid to visitor orientation and site sequencing functions and suggestions to meet the needs of ~~different~~ visitor types and motivations.
 - f) Suggested interpretive media to meet the interpretive goals and objectives (to be presented in the form of a message/methods outline or similar device). Considerations should include, but are not necessarily limited to, graphic panels, interactive exhibits, multi-media computer-based exhibits or programs, guided walks, publications, on-site tours/programs/special events, and social media.
 - g) Identification of standards for the production, maintenance, and appearance of interpretive signage and exhibit furnishings.
 - h) Suggestions for allocation of space and potential topics for temporary or rotating exhibits, given the available physical space and budget.
 - i) Suggestions for auxiliary/off-site interpretation to carry the VMHA's themes and story lines throughout the City of Valdez. This deliverable should be kept to a high level, and is included in this project to capture comments and ideas that may arise from stakeholder meetings.
6. Provide a preliminary budget for the development and installation of the exhibit, programming, and administrative and curatorial space, and guidance related to estimated maintenance costs for various interpretive media. Recommend phased implementation, as needed, to fit the available implementation budget.
 7. Draft specifications for exhibit design services to be used for the next project phases.

Commented [AG1]: FR: Suggest some other additions. What isn't included is what the museum will provide, what role we play in research and provision of themes and resource info.

Include: audience development and institutional identity; visitor experience; marketing to new and existing audiences; staffing; cost considerations; project analysis; new directions; goals of interpretation; Interpretive objectives; take-home messages

8. Generate photo-ready graphics, drawings, and written materials necessary to complete the task and supply 15 color copies each and pdf files of the draft and final plans.

4.0 PROPOSAL FORMAT REQUIREMENTS

Each response to this RFP shall include the information described in this section. Provide the information in the specified order. Failure to include all of the information specified may be cause for rejection. Additional information may be provided, but should be succinct and relevant to the goals of this RFP. Any additional information that a proposing ~~Consultant-consultant~~ wishes to include that is not specifically requested should be included in an appendix to the proposal.

Consultants are encouraged to keep the proposals brief and to the point, but sufficiently detailed to allow evaluation of the project approach. ~~Excessive information will not be considered favorably.~~ Unauthorized conditions, omissions, limitations or provisions attached to a proposal ~~will-may~~ render the proposal non-responsive and may cause its rejection.

Proposers are warned against making erasures or alterations of any kind, without initialing each and every such change. Proposals that contain erasures or irregularities of any kind, without such initialing, or omissions, may be rejected.

The proposal should be bound or contained in a loose leaf binder. Document pages shall be 8-1/2 inches by 11 inches in size or folded to such a size. Use section dividers, tabbed in accordance with this section as specified below.

4.1 Cover Letter with the following information:

- Title of this RFP
- Name and ~~Mailing-mailing Address-address~~ of ~~Firm-firm~~ (include physical location if mailing address is a PO Box)
- Contact Person, Telephone Number, Fax Number, and Email Address
- A statement that the submitting ~~Consultant-consultant~~ will perform the services and adhere to the requirements described in this RFP, including any addenda (reference the addenda by date and/or number).

4.2 Signature Requirements - The attached Proposer's Certification (Attachment A) shall be executed by an official(s) legally authorized to bind the ~~Consultant-consultant~~ which states that the proposal is valid for ninety (90) days. Include the executed copy of the Proposer's Certification under Tab G. Note: This is ninety (90) days following the closing date for the receipt of all proposals.

- Proposals submitted on behalf of a Partnership shall be signed in the firm name by a partner or the Attorney-in-Fact. If signed by the Attorney-in-Fact, there shall be attached to the proposal a Power-of-Attorney evidencing authority to sign proposals, dated the same date as the proposal and executed by all partners of the firm.
- Proposals which are submitted on behalf of a Corporation shall have the correct corporate name thereon and the actual signature of the authorized officer of the corporation written (not typed) below the corporate name. The title of the office held by the person signing for the corporation shall appear below the signature of the officer.

- Proposals which are submitted on behalf of a Limited Liability Company (“LLC”) shall be signed by the person or persons authorized to bind the LLC under the LLC’s articles of organization.
- Proposals which are submitted by an Individual Doing Business under a firm name (“dba”) shall be signed in the name of the individual doing business under the proper firm name and style.

4.3 TAB A: Firm’s Qualifications – Describe your firm and provide a statement of your firm’s qualifications for performing the requested services. Identify the services which would be completed by your firm’s staff and those that would be provided by sub-consultants or sub-contractors, if any. Identify any sub-consultants or sub-contractors you propose to utilize to supplement your firm’s staff. Include the firm’s organizational chart, including its constituent parts, and size variation of staffing levels in the past five (5) years. Indicate the approximate percentage of services to be provided to each subcontractor or contracted consultants.

4.4 TAB B: Experience and References – Provide a summary of your firm’s experience in providing these or similar services. Provide a minimum of three (3) references for projects or services similar in nature and scope that your firm’s team members have completed in the last five (5) years. Include brief descriptions of the projects, dates, client names and contact persons’ names, addresses and telephone numbers. Provide two writing samples similar in nature to the type of work to be produced for the Interpretive Plan and descriptions of the specific role of the consultant in the production of the samples. Writing samples should be limited to no more than 10 pages total. They should provide a sense of report organization and narrative approach.

4.5 TAB C: Qualifications of Team – Provide a brief summary of the role, qualifications and experience of each team member and designated project manager/lead assigned to this project, including length of service with the firm and the qualifications/experience of any sub-consultant or sub-contractor staff on your project team. A project team organizational diagram and brief resume of each team member and the designated project manager/lead for each applicable category shall be included. The geographic location of the firm and key personnel shall also be identified. Any proposed sub-consultants or sub-contractors shall be listed. Include sub-consultants’ and sub-contractors’ assigned task(s) and experience. Full resumes may be included in the appendix.

4.6 TAB D: Project Understanding – Based on the available information, supplemental research, field observations, and experience with similar projects, provide a narrative describing your understanding of the services requested in this RFP, your general approach and any major challenges to achieving the Valdez Museum & and Historical Archive’s stated goals. Include any issues that you believe will require special consideration for this project. Also identify any unique approaches or strengths that your firm may have related to this project. The Valdez Museum & and Historical Archive Building building Committee committee will assess your understanding of all aspects of the project based on the overview.

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4.7 TAB E: Project Plan – Provide a detailed discussion of your firm’s approach to the successful implementation of this project. Include thorough discussions of methodologies you believe are essential to accomplishing this project. Include a proposed work schedule, with project stages, milestones, and deliverables, to accomplish all of the required tasks within the desired timeline.

Identify the staff who would be assigned to each task, including sub-consultants and sub-contractors. List any necessary equipment, training or installation services required.

4.8 TAB F: Cost Proposal – Provide a total cost proposal for all products and services to be delivered, and a breakdown of costs delineated by tasks as described in your project plan. Include a schedule of hourly rates for all proposed staff and the amount of time each person will be devoted to this project. Define any reimbursable expenses requested to be paid by the ~~Valdez Museum & Historical Archive~~.

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4.9 TAB G: Required Statements/Documents – ~~include statements of assurance regarding the following requirements in the proposal:~~

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- Non-substitution for the designated members of the team without approval by the ~~Valdez Museum & Historical Archive Building Building Committee committee staff~~ (Section 4.0)
- The absence of a conflict of interest (Section 9.4)
- Indicate your ability and agreement to fulfill the indemnification and insurance requirements contained in the sample contract (Section 9.7). (Please note that actual certificates of insurance are not required as part of your submittal.)
- A statement that nothing contained in the submitted proposal will be proprietary. (Section 9.21)
- Submit following documents with proposal:
- Executed copy of Proposer’s Certification (Attachment A)

4.10 TAB H: Exceptions – Describe any and all proposed exceptions, alterations or amendments to the Scope of Services or other requirements of this RFP, including the Sample Contract (Attachment B). The nature and scope of your proposed exceptions may negatively affect the evaluation of your submittal and the ~~Valdez Museum & Historical Archive’s~~ determination of whether it is possible to successfully negotiate a contract with your firm.

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4.11 TAB I: Competency of Proposers – The ~~Valdez Museum & Historical Archive~~ wants to ensure that the successful ~~Consultant consultant~~ has the necessary facilities, ability, experience, and financial resources to provide the services specified herein in a satisfactory and timely manner. Please list and explain any pending bankruptcies, liens, stop payment notices, judgments, lawsuits, foreclosures, and any similar actions filed or resolved in the past seven (7) years. Please indicate whether a client has ever terminated a contract with your firm for breach, and if so, please explain.

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5.0 SUBMITTAL INSTRUCTIONS

5.1 Your submittal package shall include the following:

- One (1) original and six (6) printed copies of your proposal; and
- One (1) electronic copy of your proposal in PDF format on CD, flash drive or other electronic media

5.2 Proposals shall be submitted not later than the time and date indicated on the cover page of this RFP. All submittals shall be submitted in a sealed envelope or container and clearly marked with the RFP title on the outside of the parcel.

~~5.3 Proposals shall be submitted to:~~

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Valdez Museum & Historical Archive
Attn: Patricia Relay
P.O. Box 8

Valdez, AK 99686
prelay@valdezmuseum.org
Fax: (907) 835-2764

5.4 The VMHA shall not be responsible for proposals delivered to a person or location other than that specified herein.

5.5 Postmarks will not be accepted and proposals received after the deadline date and time will not be accepted or considered unless otherwise agreed by both parties via verbal or written agreement.

5.6 The VMHA reserves the right to waive minor defects and/or irregularities in proposals, and shall be the sole judge of the materiality of any such defect or irregularity.

5.7 All costs associated with proposal preparation shall be borne by the proposer.

6.0 EVALUATION CRITERIA

The following evaluation criteria and rating schedule will be used to determine the most highly qualified firm(s).

Evaluation Criteria

- Experience working with museums in Alaska.
- Experience working with museums that operate with a modest budget (under \$1,000,000)

Commented [PR3]: This could be included in an introductory paragraph for the evaluation section

Maximum

Points Possible

A. Experience and qualifications of firm and proposed staff/sub-consultants/sub-contractors. Quality of work product as demonstrated through submitted work samples (per Sections xx – xx)

20

B. Established record of interpretive planning for similar museum exhibit and/or outdoor interpretive projects. (per Section xx)

25

C. Understanding of the Project – Proposed Project Plan

(per Section xx – xx)

40

D. Proposed Cost

(per Section xx)

15

Total Possible Points:

100

7.0 SELECTION PROCESS

7.1 Proposals submitted will be reviewed by a selection committee. Consultants that have submitted the best and most complete proposals may be invited to an interview. The number of ~~Consultants consultants~~ invited to an interview may vary depending upon the number of proposals submitted.

7.2 The VMHA reserves the right to make a selection after review of the proposals without oral interviews; therefore, the proposal should be submitted initially on the most favorable terms that the ~~Consultant-consultant~~ might propose.

7.3 A contract will be negotiated with the ~~Consultant-consultant~~ considered best meeting the VMHA's need for this project. In the event a mutually satisfactory contract cannot be negotiated with the VMHA's first choice, negotiations may be terminated and commenced with the ~~Consultant-consultant~~ considered next best in meeting the VMHA's needs for this particular project.

7.4 The selected ~~Consultant-consultant~~ will be required to execute a prepared contract. The contract may further refine the scope of services and will provide for the terms and conditions of employment.

7.5 The award of any contract is expressly contingent upon ~~the Valdez Museum & and Historical Archive Board-board of Directors-directors'~~ approval and the availability of funds.

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8.0 GENERAL TERMS & CONDITIONS

8.1 Standard Contract. Upon completion of the evaluation and recommendation for award, the selected ~~Consultant-consultant~~ will be required to execute an agreement ~~which will be reviewed by the VMHA Building-building Committee-committee and finally approved by the museum's Board-board of Directors-directors.~~

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8.2 Independent Contractor. At all times the ~~Consultant-consultant~~ shall represent himself/herself to be an independent contractor offering such services to the general public and shall not represent himself/herself, or his/her employees, to be an employee of the VMHA. Therefore, the ~~Consultant consultant~~ shall assume all legal and financial responsibility for taxes, FICA, employee fringe benefits, workers' compensation, employee insurance, minimum wage requirements, overtime, etc., and agrees to indemnify, save, and hold the VMHA, its officers, agents, and employees, harmless from and against, any and all loss, cost (including attorneys' fees), and damage of any kind related to such matters.

8.3 Non-Appropriation. The VMHA may terminate any resulting contract at the end of any fiscal year, December 31st, without further liability other than payment of debt incurred during such fiscal year, should funds not be appropriated by its governing body to continue services for which the contract was intended.

8.4 Conflict of Interest. The ~~Consultant-consultant~~ shall warrant that no official or employee of the VMHA has an interest, has been employed or retained to solicit or aid in the procuring of the resulting contract, nor that any such person will be employed in the performance of such contract without immediate divulgence of such fact to the VMHA. Consultants submitting a proposal in response to this RFP must disclose any actual, apparent, direct, indirect, or potential conflicts of interest that may exist with respect to the ~~Consultant-consultant~~ or the ~~Consultant's-consultant's~~ management or employees relative to the services to be provided. Violation of this section shall be a material breach of the contract entitling the VMHA to any and all remedies by law or in equity.

8.5 Indemnification ~~& and~~ Insurance Requirements. The selected ~~Consultant-consultant~~ shall provide complete and valid insurance certificates within ten (10) days of the VMHA's written request. Failure to provide the documents within the time stated may result in rejection of the ~~Consultant's-consultant's~~ proposal. Alterations to the terms and conditions shall not be allowed.

8.6 Cost of Preparing Proposal. The VMHA will not pay any costs incurred by any ~~Consultant-consultant~~ in preparing or submitting a proposal in response to this RFP.

8.7 Proposals Property of the VMHA. All documents or materials submitted with or in conjunction with any proposal, including but not limited to electronic files, shall become the property of the VMHA after the proposal submission deadline. During negotiations, the scope of services may be amended by the VMHA and negotiated based upon ideas provided by other proposers or any other source.

8.8 Proposals are Public Records. All proposals submitted are subject to the public disclosure requirements under the laws of the State of Alaska, unless the VMHA identifies and exercises a right or obligation to exempt any record from public disclosure. However, proposals will not be disclosed until negotiations are complete and a recommendation for selection and award is made to the VMHA Board of Directors via a published agenda.

8.9 Rejection of RFP. The VMHA reserves the right to reject any or all proposals, to waive defects or irregularities in any proposal or in the RFP process, and to offer to negotiate or contract with any ~~Consultant-consultant~~ in response to any RFP. This RFP does not constitute any form of offer to contract.

8.10 Increasing/Decreasing Portions of RFP. The VMHA reserves the right to increase or decrease the amount of any portions of the work represented in the RFP and/or to omit portions of said work, as may be deemed necessary by the VMHA.

8.11 Modifying RFP. The VMHA reserves the right to modify any portion of, or to postpone or cancel this RFP at any time, and/or reject any and all submissions without indicating any reason.

8.12 If no proposal is accepted, the VMHA may elect to have the services performed in some other manner.

8.13 Withdrawal of Proposals. Proposals may be withdrawn prior to the date and time specified for proposal submission with a formal written notice by an authorized representative of the proposer. Proposals submitted will become property of the VMHA after the proposal submission deadline.

8.14 Proposal Postponement and Amendment. The VMHA reserves the right to revise or amend the RFP or specifications up to the time set for opening of the proposals. Copies of such amendments shall be furnished to all prospective proposers. If revisions and amendments require changes in quantities, prices or scope of services, the date set for opening of the proposals may be postponed by such number of days as in the opinion of the VMHA shall enable proposers to revise their proposals. Any revisions or amendments to the RFP will become incorporated into any contract awarded pursuant to the RFP.

8.15 Proprietary Information. Proposers submitting a proposal in response to this RFP must provide a statement that nothing contained in the submitted proposal will be proprietary. However, if a proposer desires to claim a privilege against public disclosure for a trade secret or other proprietary information, such information must be submitted with the proposal in a separate envelope marked "confidential." The ~~Consultant~~ consultant shall defend, indemnify and hold harmless the VMHA regarding any claim by any third party for the public disclosure of the "confidential" portion of the proposal.

8.16 Right to Request Additional Information. During the evaluation process, the VMHA reserves the right to request additional information and clarifications from proposers. Such information will be requested in writing to the specific proposer. This information will become a part of the original proposal submitted by the specific proposer and will be used by the VMHA in evaluating the proposal and will not be shared with other proposers during the evaluation and negotiation process.

8.17 Modification of Proposals. Modification of a proposal already received will be considered only if the modification is received prior to the deadline date for receiving proposals. All modifications shall be made in writing, executed, and submitted in the same form and manner as the original proposal.

8.18 Examination of Contract Documents. Each proposer shall thoroughly examine and be familiar with the terms of this RFP, legal and procedural documents, general conditions, specifications, and addenda (if any), which will constitute the contract documents. Submission of a proposal shall constitute acknowledgement that the proposer has thoroughly examined and is familiar with the contract documents. Failure or neglect of a proposer to receive or examine any of the contract documents shall in no way relieve the proposer of any obligation with respect to their proposal or to the contract. No claim for additional compensation will be allowed which is based upon lack of knowledge of any contract document.

8.19 Non-Discrimination. The VMHA maintains various policies related to contractual service providers. Among these is an anti-discrimination policy, which requires that the VMHA's contractors not discriminate in hiring on the basis of gender, race, religion, sexual orientation, medical condition, and all other categories protected by law. Upon acceptance of a proposal, the VMHA may request that the selected Consultant sign a statement affirming its compliance with this policy.

8.20 No Assignment or Modifications. This awarded contract is to be binding on the successors and assigns of the parties hereto. The services called for herein are deemed unique and except as provided herein Consultant shall not assign, transfer, subcontract, or otherwise substitute its interest in the

agreement or any of its obligations herein without the written consent of the VMHA. The Agreement may be modified only by a written amendment signed by the parties.

8.21 Bankruptcy. Upon filing for any bankruptcy or insolvency proceeding whether voluntary or involuntary, or upon the appointment of a receiver, trustee, or assignee for the benefit of creditors, the Consultant must notify the VMHA immediately. Upon learning the actions herein identified, the VMHA reserves the right, at its sole discretion, to cancel the contract.