

**Smithsonian Institution  
Request for Quote (RFQ)**

***Community Outreach Specialist for Access Smithsonian***

**Technical or Professional, Non-personal Services**

This Request for Quote (RFQ) is issued by the Access Smithsonian office, Smithsonian Institution (SI), for technical professional, non-personal services to provide organizational, administrative, and communication services in accordance with the Statement of Work (SOW).

**I. Submitting Your Quote**

Quotes to include all supporting documents may be submitted digitally. Please read RFQ for details on submissions. See Section VIII (Information to be Submitted with Quote) for a summary of what to include in quote packages.

**Quotes are due by Thursday, September 30, 2021 at 5:00 p.m.** Please address electronic quotes to: Ashley Grady, Senior Program Specialist, [GradyA@si.edu](mailto:GradyA@si.edu); Subject: AS Community Outreach Specialist RFQ

All quotes must be submitted online via email.

**II. Description of Required Services**

Access Smithsonian (AS) has a requirement for external outreach and communication and outreach services. The Smithsonian anticipates a single firm fixed price award for organizational, administrative, and communication services. It is anticipated that the offeror will be available to provide support estimated 40 hours per week; however, hours may vary based on deliverables in each project phase.

The following knowledge, skills and experiences are required:

- Experience and fluency in using digital platforms Zoom, Microsoft Teams, and Office 365.
- Experience and fluency in using professional design software.
- Fluency in Spanish is preferred.
- Experience in developing outreach strategies to and developing relationships with diverse communities (e.g., disability, BIPOC, Latino/a/x, LGBTQ+, etc.)
- Knowledge of community and local resources in DC, Maryland, and Virginia
- Knowledge of current accessibility best practices
- Ability to manage multiple projects simultaneously.
- Skill in communicating complex concepts in a clear and concise manner, including ability to deliver training.
- Experience developing digital and print marketing materials.
- Experience developing and maintaining electronic databases and spreadsheets.
- Knowledge of working with adults with dementia and their care partners
- Knowledge of current accessibility best practices
- Commitment to diversity, equity, access, and inclusion

The period of performance is anticipated to be a nine-month base period with two (2) one-year optional periods.

The Smithsonian Institution reserves the sole option to extend this order to engage the Contractor in providing similar services for two (2) one-year periods. These option periods are subject to 1) the need for the service still exists, 2) acceptance and approval by the Contracting Officer's Technical Representative during the respective contract period, 3) availability of funds from which payment for contract purposes can be made, and 4) the contract price for services to be provided under the optional periods shall be reasonable and negotiated at time option is to be exercised.

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.

The period of performance is anticipated to begin November 1, 2021 and be completed July 31, 2022.

Option 1: If exercised shall be from August 1, 2022 through July 31, 2023

Option 2: If exercised shall be from August 1, 2023 through July 31, 2024

### **III. Evaluation**

The Smithsonian Institution plans to award based on best value. The Smithsonian Institution plans to award without discussions, however, does reserve the right to conduct discussions if later determined by the Contracting Officer to be necessary.

All the following factors are of equal importance. Evaluation factors are:

#### **A. Relevant Experience/Past Performance**

**1. Technical Approach:** The Offeror shall demonstrate its capability to satisfactorily provide the required goods and services by describing the technical approach to accomplish this requirement. The prospective offeror's quote shall include a technical narrative (to include demonstrating experience in all areas of the SOW) that details the Offeror's approach toward providing the required goods and services under this requirement. The narrative shall be specific and clearly demonstrate the offeror's understanding of and capability to meet all Government requirements and goals. The Offeror should provide evidence of sufficient planning to show that the requirement will be accomplished as required and on schedule, utilizing all available resources.

- **A sample communication and outreach plan (no more than 2 pages)** for reaching local adults with dementia and their care partners and how to engage them with museums on-site and virtually. The product sample should be delivered with the quote as an email attachment and will not be accepted after the RFQ deadline. Product samples shall be submitted at no expense to AS.
- **Resume** – Please provide a resume as an attachment to the quote.

#### **B. Past Performance:**

Contractor shall provide three (3) past performance references. Past performance should be indicated by a list of current or previous contracts (within the past three years) with names of points of contact and their current telephone numbers who can answer specific questions on quality, workmanship, and scheduling. Quote shall include the following information:

Agency Name, address

Contract number

Contract type

Total contract value

Contract work (a brief description of the purpose of the contract)

Contracting Officer Name or contact name (if not government), telephone number, location, and e-mail address.

The point of contact for these contracts should be able to answer specific questions on quality, workmanship, scheduling, timeframes, total contract dollar values, locations of contract performance, and complexity of the work to facilitate determination of our capability to perform the work required as cited in the statement of work. Contracts listed may include those entered by the Federal Government, agencies of State and local governments, and commercial customers.

**C. Price:**

Prospective offerors shall provide a price quote, not to exceed \$31.65 per hour, and are encouraged to provide additional discounts to the Smithsonian. Firm fixed pricing shall be submitted for the base and each optional period.

**IV. Insurance Requirements**

Prospective contractors are required to have General Liability Insurance for \$1,000,000. The SI must be listed as additional insured for the General Liability insurance. Proof of insurance must be submitted with quotes.

If a prospective offeror does not have its own General Liability Insurance, the vendor may be eligible to purchase insurance through the Smithsonian Institution under certain circumstances. If an offeror does not have its own insurance, it should indicate that it is interested in the SI's Commercial General Liability Insurance Policy on its quote.

**V. 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 VI 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](mailto: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.

**VI. 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](http://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) 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 procurement prior to contract or purchase order award, and at the time any modifications or amendments to awards might be required.

## **VII. 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/?vgnextoid=cb2a535e0869d110VgnVCM1000004718190aRCRD&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 Contractors' Personnel, is 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 another 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.

*Homeland Security Policy Directive 12 (HSPD-12)*

### **VIII. Information to be Submitted with Quotes**

Quotes submitted must include the following information to be deemed responsive to this Request for Quote and accepted by AS:

- A. Project Title
- B. Business name, address, telephone number, email address, and DUNS number
- C. Business point of contact name, telephone number, and email address
- D. Pricing (Ensure that base year and option year pricing is included.)

- E. Project Proposal which outlines an initial estimated timeline and approach to producing the deliverables outlined in the attached Statement of Work
- F. Past Performance information should include the contact number, contact person with email address and other relevant information for at least 3 recent relevant contracts for the same or similar goods and/or services.
- G. Certificates or other documentation confirming appropriate types and levels of insurance required are in effect or notifying of plans to obtain the appropriate levels of insurance before starting work on contract.
- H. Product Samples – Please provide the following:
  - **A sample communication and outreach plan (no more than 2 pages)** for reaching local adults with dementia and their care partners and how to engage them with museums on-site and virtually. The product sample should be delivered with the quote as an email attachment and will not be accepted after the RFQ deadline. Product samples shall be submitted at no expense to AS.
  - **Resume** – Please provide a resume. Resume should be delivered with the quote as an email attachment and will not be accepted after the RFQ.
- I. Cite the date through which pricing submitted is valid.

**Attachment(s):**

1. Smithsonian Institution, Statement of Work dated (July 1, 2021)
2. Smithsonian Institution Purchase Order Terms & Conditions (SI-147A dated Feb 2018 rev)
3. Smithsonian Institution Privacy and Security Clause (SI-147B dated June 2020 rev)
4. Smithsonian Institution Independent Contractor Clauses (May 2003)
5. Smithsonian Institution Rights in Data Clause (2001)
6. Smithsonian Institution OCON 140 Confidentiality and Disclosure Clause (January 2020 rev)
7. Smithsonian Institution Smithsonian Directive 931 (dated September 2020)
8. Smithsonian Institution OCON 520 (October 2009)
9. Smithsonian Institution COVID-19 attachment (March 2021 revised)
10. Smithsonian Institution Contracting Officer's Technical Representative (COTR: Emma Cowan-Young) March 2010 rev.

## **Statement of Work – Community Outreach Specialist for Access Smithsonian September 2021**

### **Background**

Established in 1991, the mission of the Smithsonian Institution's Access Smithsonian (AS) office is to ensure that staff, volunteers, interns, fellows, and visitors feel welcome in the museum environment by providing them consistent and effortless access to the Smithsonian's programs, collections, and facilities. Access Smithsonian is committed to the belief that access should be inclusive, integrated, independent, and dignified. Through collaborations with Smithsonian Institution units, Access Smithsonian strives to improve access to existing resources as well as to design each new program, exhibition, and building to be inclusive of people with disabilities.

### **Scope**

The contractor will coordinate all external outreach and community-building initiatives for Access Smithsonian. Services include developing local and national outreach plans to the disability community; researching current trends and resources for adults with dementia; developing action plan for diversifying program audiences; developing outreach and recruitment plan for AS programs: (a) Morning at the Museum, (b) See Me at the Smithsonian, and (c) User/Expert Advisory Group; creating and maintaining comprehensive database of contacts and connections for all initiatives; creating and distributing professional marketing materials digitally and in print; representing Access Smithsonian at webinars, virtual conferences, community events, and other public forums.

### **Work Location**

Contractor shall perform tasks on-site and remotely. Most tasks may be performed remotely, but contractor will be required to physically travel to community locations for presentations, events, programs, etc. Contractor and COTR shall mutually agree upon a work schedule and work location for services.

### **Deliverables**

- Develop a marketing, communication, and outreach plan for the Washington, DC Metro Area (including Maryland and Virginia) for AS programs (See Me, Morning at the Museum & User/Expert Group). Contractor will collaborate with Senior Program Specialist & COTR to determine priorities for each program. Plan should include internal & external stakeholders, goals & objectives, methods of delivery & implementation, timelines, and benchmarks to measure success. Plan must be completed by December 31, 2021.
- Develop a marketing, communication, and outreach plan for national audiences for all AS programs (See Me, Morning at the Museum & User/Expert Group). Contractor will collaborate with Senior Program Specialist & COTR to determine priorities for each program. Plan should include priority stakeholders, goals & objectives, methods of delivery & implementation, timelines, and benchmarks to measure success. Plan must be completed by January 31, 2022.
- Develop digital and print promotional marketing materials for AS programs (See Me, Morning at the Museum, and User/Expert Group). Materials should be created for the purpose of recruiting program participants and engaging external stakeholders. Materials should include flyers and sample advertisements for print media. Materials should be completed by February 28, 2022.
- Create database of existing AS program participants and add new contacts as they are recruited. Database of existing contacts should be completed by February 28, 2022. Contractor will continue to add new contacts for AS programs throughout the duration of the period of performance.

- Develop presentation materials for promoting AS programs to external stakeholders and potential program participants. Materials should include PowerPoint presentations, FAQs, briefing & information packets, and intake forms for participants. Materials will be used for on-site presentations & meetings, information fairs, on-site community events, and virtual events. Materials should be completed by March 30, 2022.
- Perform targeted outreach to external stakeholders and potential program participants using the communication plans listed above. Outreach methods should include email & phone communications, presenting on-site & virtually to external stakeholders, and attending community events & meetings. Outreach should begin on April 1, 2022 and continue for the duration of the period of performance.
- Contractor will host a minimum of 5 presentations for each AS program (Morning at the Museum, See Me & User/Expert Group) to external stakeholders by July 31, 2022.
- Contractor will recruit a minimum of 20 new See Me participants by July 31, 2022.
- Contractor will recruit a minimum of 50 new Morning at the Museum participants by July 31, 2022.
- Contractor will recruit a minimum of 10 new user/experts by July 31, 2022.
- Create plan for conducting a national survey of existing resources, tools, leaders, and programs for adults living with dementia by July 31, 2022.
- Send weekly progress reports to the Senior Program Specialist & COTR.
- Support the Senior Program Specialist in producing an annual report to external funders.

## **Tasks**

### **Marketing and Communications**

- Collaborate with Senior Program Specialist & contractors to produce print and digital marketing materials for AS programs.
- Update marketing materials as Access Smithsonian programs on a regular basis to reflect relevant events & information.
- Distribute materials widely to increase participation for all AS programs.
- Create and maintain local and national marketing lists for AS programs, prioritizing See Me, Morning at the Museum, and the User/Expert Group
- Create external communications plan to elevate the profile of AS and increase its connections to the disability community.
- Collaborate with Smithsonian colleagues to cross-promote accessibility programs.

### **Community Outreach**

- Collaborate with Senior Program Specialist & contractors to develop outreach strategies for AS programs and initiatives.
- Ensure organizational continuity and maintenance of existing relationships with community partners.
- Attend and present at community outreach events about AS programs.



- Cultivate new relationships with local and national collaborators with a focus on serving diverse communities, with a strong focus on the following communities: disability, BIPOC, Latino/a/x, and LGBTQ.
- Work with Senior Program Specialist to develop a plan for conducting a national survey of existing resources & leaders for serving individuals living with dementia and their caregivers.

#### Administrative Tasks

- Prepare and deliver weekly updates to Senior Program Specialist
- Prepare monthly invoices and deliver to COTR.
- Meet weekly with Senior Program Specialist
- Participate in biweekly See Me meetings and bi-monthly Morning at the Museum meetings.
- Assist Senior Program Specialist in writing annual funder reports.

#### Knowledge and Skills

- Experience in developing communications, outreach, and marketing plans for museums and/or other cultural arts organizations
- Experience in developing print and digital marketing materials
- Experience using professional design software to create marketing materials.
- Proficiency in using Zoom, Microsoft TEAMS, and Office 365
- Proficiency in Spanish is preferred, not required.
- Experience developing and maintaining electronic databases and spreadsheets.
- Experience in project tracking and reporting to assist with project management.
- Experience in managing multiple projects simultaneously.
- Skill in communicating complex concepts in a clear and concise manner, including ability to deliver training.
- Experience cultivating relationships with diverse audiences and organizations, with a specific focus on the following communities: disability, BIPOC, Latino/a/x, and LGBTQ.
- Knowledge of current accessibility best practices
- Knowledge of and commitment to diversity, equity, access, and inclusion
- Knowledge of community and local resources in DC, Maryland, and Virginia