1. Project Summary

The Smithsonian’s National Museum of Natural History (NMNH) seeks a contractor to work with the education team at NMNH to help support educational activity development, programming and evaluation for Q?rius, an innovative 10,000 square foot interactive programming space developed and operated by the NMNH Office of Education & Outreach. The contractor will work closely with the Chief of Experience Design and Evaluation and a team of educators to coordinate, plan, implement and evaluate programs activities. The Project Manager will meet with team members, help to determine timelines and schedules, create materials, communicate with scientists, educators and technical specialists, and assess and document programs.

2. Context: Smithsonian’s National Museum of Natural History

The Smithsonian’s National Museum of Natural History, located at 10th Street and Constitution Avenue N.W. in Washington, D.C., is the most-visited natural history museum in the world. Opened in 1910, the green-domed museum on the National Mall is dedicated to maintaining and preserving the world’s most extensive collection of natural history specimens and cultural artifacts. It fosters significant scientific research and educational programs and exhibitions that present the work of its scientists to the public.

The museum is regarded as a global leader in natural history collections, collections-based research, scientific discovery, and natural history exhibition. The current and ongoing restructuring of the Office of Education & Outreach is part of an institution-wide effort to promote the education and outreach activities of the museum to the rigor and renown of its science activities. A related intent is to advance the impact that the museum has on its visitors and on the field of museum education, particularly the integration of research and practice in an institutional setting.

Context: Q?rius

To work toward this end, in December 2013, the museum opened an innovative, 10,000 square foot interactive programming space. In Q?rius, visitors have access to a 6,000 object collection representing the museum’s research departments and a broad slate of interactive, participatory, and engaging programs ranging from self-guided discovery to participating with Smithsonian scientists in their research.

Q?rius has a broad slate of participatory and engaging experiences to satisfy visitors’ own curiosities and advance their understanding of the world and our place in it. Types of experiences include:

- Person-to-person interactions with scientists and other museum experts, including demonstrations of high-tech research tools, conversations about current science topics, workshops, panel discussions, distance learning and more.
• Participatory, object-based discovery activities intended to teach a specific skill or pique interest in a specific area of science or research
• Inquiry-focused, object-and-data-based simulations of NMNH field research or collections work, usually focused on using evidence to solve a mystery, draw a conclusion, or recommend a decision
• Immersive, collections-based experiences using a 6,000 object collection of specimens and objects – including digital records and associated video and web assets – to answer museum-posed or their own questions, or create and share their own digital collections
• Participation in collections-based curation and research, including identification of recently collected specimens and assisting the research team with creating digital records of collections specimens and objects
• Discussion of science in the news and relevant national and international scientific topics with scientists and other enthusiastic and knowledgeable staff and visitors
• Recording progress, questions, and notes in a digital field book, available at the museum, online, or via mobile device
• Creating digital media and integrating natural history objects and specimens into man-made designs in a natural-history-focused maker space

These experiences are created based on the Q?rius philosophy, which has its foundation in learning research around best practices in inquiry-based informal education and science participation. The Q?rius space is a learning lab for the educators and other staff at NMNH, who constantly prototype, test and refine activities and programs there. The iterative development model of Q?rius is now expanding beyond the Q?rius space to programs and activities throughout the museum’s exhibit halls, and to programs outside the museum. An evolving evaluation framework and set of instruments helps the educators assess their work. Over a dozen educators, interns, fellows and others work on activities and programs, and dozens of others are involved in the graphic design, fabrication, logistics and other matters around the activities. All of this requires a robust project management system to track progress, and make sure all parties are informed, while retaining a sense of creativity, experimentation and innovation.

The Q?Method Activity Development Process
An overview:
A. The Chief of Experience Design and Evaluation identifies activities and programs that need to be developed, based on program needs, funding, gaps in content areas, opportunities with scientist, etc. The schedule of activity development is established for the next 6 months on roughly 6-week rotations. 5 or 6 activities are in one 6-week session. Each activity to be developed is assigned a primary developer, and sometimes additional people on the team.
B. An initial orientation meeting with the developers in the next 6-week session re-introduces them to the Q?Method process and philosophy. The Project Manager ensures all developers understand where to access information and forms, and communicates the expectations.
C. Activity Developers access a suite of materials online, including an Activity Brief form where they must define the project goals, the Project Management schedule and steps, the guiding philosophy and assessment framework, and other forms and resources.
D. Activity Developers fill out their Activity Brief and get approval to move forward.
During the development process, developers present their concepts and prototypes in at least 2 meetings: the Q?Method Lab and the Q?Method Workshop. The Q?Method Lab is for developers within the session, and the Workshop is for a large group of educators.

Visitor testing also takes place during the development process, with other educators using the Q?Method evaluation instruments to assess visitor responses and give feedback to the developer.

Developers refine the activity based on visitor testing, feedback from colleagues in the Labs and Workshops, and self-assessment based on the framework.

Logistics are worked through, including scheduling Exhibits for fabrication, ordering supplies, finalizing graphics and text, etc.

Final review and approval of the activity, showcase.

Volunteers are trained, background materials are finalized.

This process is used to create activities – often hands-on carts with objects and interactivity, led by a facilitator. Alternatively, programs are usually one-off events, such as Expert is In programs that feature a scientists speaking with the public about their work. These programs are guided by the same principles as the activities, but the development process is much shorter and less involved.

3. Deliverables

The deliverables for this contract are provided below, with the associated tasks required for each.

A. Q?Method Activity Development Project Management

The Q?Method as a system is in its infancy – it was launched in June 2015. We have established the basic process outlined above and are in the second session of using it, with good results. The process is ready for refinements. The Q?Method Project Manager will evaluate the existing system, documents, processes and procedures while working with them in the first weeks of the contract, then recommend changes and refinements, and experiment with changes. Specific refinements to be made (corresponding with the Q?Method process outlined above) include:

a. Project Manager helps to prioritize and schedule activities for development by weighing various factors and collaborating with staff and contractors.

b. Project Manager creates materials that effectively communicate processes and procedures by analyzing options (which could be anything from online project management software to a data visualization of the process to printed binders), experimenting, getting feedback and finalizing. Each week, activity developers meet in creative workshop and lab sessions to share and critique work. The Q?Method Project Manager will schedule these meetings, set the agendas, inform participants of their roles, take notes, and establish action items.

c. Project Manager refines and sometimes recreates Activity Development materials, including the Activity Brief, Logistics Form, Testing Assessment Instrument.

d. Project Manager creates an intuitive system for tracking progress, approvals and feedback and ensures developers are clear on next steps.

e. Project Manager helps to coordinate and lead weekly workshops and labs in terms of communicating Q?Method philosophy and process.
f. Project Manager helps to refine and improve the process by which educators test with visitors, assess visitor responses, analyze data, and recommend changes.

g. Project Manager regularly checks in with developers on a weekly basis to ensure progress.

h. Project Manager devises new system for managing logistics around activities, including coordinating meetings, refining forms, creating briefing documents and systematizing scheduling.

i. Project Manager ensures checks and balances for final approval of activities.

j. Project Manager establishes system for finalizing activities and ensures that developers understand final steps in the process for finishing and archiving activities.

B) Scientist Liaison Project Management
Support Experience Development Team in planning, promoting and implementing expert-led programs in Q?rius for various science disciplines.

- **Coordinate Scientist Liaison Group**
  - Coordinate Scientist Liaison monthly meetings and agendas
  - Refine Scientist Liaison handbook and binder
  - Track tasks, goals, roles and outcomes for the group
  - Work closely with educators to strategically plan educational programs

- **Coordinate an Average of Two Q?rius Activities Weekly.** Coordination will include some of the following for each (2-5 hours for each activity):
  - Communicate with internal and outside groups to promote programs, Create marketing materials by writing and editing text, and formatting and adding image and text to templated signs, arranging printing, distribute printed and digital promotional materials
  - Coordinate logistics for special expert programs not related to specific departments (i.e., Artist is In) and occasional special events
  - Procure supplies and materials, process specimen paperwork, Obtain media rights as needed
  - Communicate with experts and other staff about schedule, materials and technical needs
  - Arrange scheduling, parking permits, loading dock arrangements, behind-scenes passes if needed, and wet-specimen approval.
  - Meet staff before program to help set up and ensure all materials are in place
  - Work with technical staff to set up and run video presentations

C) Administrative Assistance
Support the Experience Design branch of Education and Outreach by helping to coordinate calendars and schedules and working with other logistics managers to develop and improve systems and processes. Approximately 3-4 hours per week.

- Schedule meetings, remind educators and other staff of deadlines, keep track of calendar
- Plan weekly team meetings, set agendas, update digital tracking assets and other documentation
- Contribute to the development of creative strategies for program development and implementation
o Attend planning meetings, take and distribute notes and action items from meetings
o Provide technical assistance to scientists and other staff through operating and moving equipment such as monitors and microscopes
o Contribute to the writing of proposals, scopes of work and other reports and strategy documents
o Coordinate logistics for planning and reserving rooms for the E&O Reflective Practice/Journal Club; Manage materials and updates to the E&O Learning Library
o Support Digital Content Team with the tracking and editing of Q?rious program blogs for the Q?rious Blog

D) Evaluation Reports on Activities and Programming
Spend approximately 3 hours per week supporting ongoing assessment of museum education programs.

- Help to create strategic plan, assessment criteria and instruments for Evaluation. Contribute to Scope of Work for outside evaluation firm to conduct program evaluation
- Observe programs and document interactions based on pre-established criteria
- Provide expert presenters with feedback
- Take and organize photos, videos, notes and other documentation
- Organize evaluation and assessment information into monthly report
- Schedule and train interns to observe and assess programs and to do research and write reports for future programs

4. Qualifications

The contractor is expected to have demonstrated capabilities in project coordination, including excellent organizational and time management skills. The contractor is expected to have excellent written and verbal communication skills, including in-person and phone communication skills and high-quality editing and formatting of text. The contractor must have experience using word processing, calendar and desktop publishing software. The ability to work well as a part of a team, to support multiple projects at one time, to negotiate diverse interests, are of vital importance to the successful performance of this statement of work. Ideally, the contractor will have experience with museums or other informal learning environments, and with marketing and graphic production. The contractor is expected to be available for onsite collaboration at the National Museum of Natural History, Washington, DC for meetings up to approximately 12 hours per week, including some Saturdays and occasionally Sundays.

5. Scope and Timeframe

All project activities and deliverables will begin no later than September 15, 2015 and be completed no later than February 1, 2016.

The nature of the deliverables demands that some portion of this work will be conducted onsite at the NMNH, in office and exhibit environments.
6. PROPOSAL PREPARATION INSTRUCTIONS:

**General.** On or before 5:00 PM in the vendor’s time zone on August 17, 2015, Offerors will be expected to provide a proposal via email to brayr@si.edu.

At the minimum, offerors need to demonstrate that they meet the acceptability standards for non-cost factors, including that they have the ability to perform the requirements in a timely manner.

**Technical Proposal (Maximum 3 pages, not including resume)**
The Technical Proposal shall address the Statement of Work and Deliverables sections outlined above; and shall contain sufficient quantitative and qualitative details to allow a complete and accurate evaluation from a strictly technical viewpoint. When preparing their technical proposals, Offerors should consider the evaluation criteria set forth below, against which the proposals will be evaluated

a) **Plan of Accomplishment**
   The offeror shall provide a brief narrative explanation of the method and/or approach to the content and deliverables, and how they will proceed with the project to ensure all work is completed on time.

   A schedule of deadlines for deliverables should be included in the proposal, including those identified above in the Deliverables section and any additional key deadlines proposed by the offeror, including those for NMNH staff. Final schedule will be negotiated based on coordination between the proposal and the Museum’s strategic timelines. All activities, must be completed by **February 1, 2016.**

b) **Capability to Perform**
   The offeror shall specifically address capability and capacity to perform the work required for this project, considering its size, scope and schedule. The offeror shall specifically address current capability, capacity and ability to complete this project considering the schedule.

c) **Staffing**
   The offeror shall provide resumes of key personnel or resume of individual offeror if an individual proposal. Resumes should state experience as it relates to this project.

d) **Experience**
   The offeror shall provide examples of specialized experience and demonstrated technical competence in performing similar work as requested herein, preferably completed within the last five years.

**Cost Proposal**
Cost Proposals shall address pricing of the work as requested herein. The price proposals shall be all-inclusive. Cost proposals should include costs broken down and justified according to specific categories of deliverables, as indicated in section 4, “Deliverables,” above.
Proposal Evaluation
Proposals shall be evaluated in accordance with the following criteria being applied to the information requested above:

“Plan of Accomplishment” and “Capability to Perform” shall be granted equal weight and shall together be granted more weight than “Staffing,” and “Experience.” “Staffing” and “Experience of the Firm” shall be granted equal weight. All evaluation factors other than cost, when combined, are granted more weight than cost.

Award of a contract shall be made to the responsive, responsible offeror, whose combined cost and technical proposal is, in the opinion of the Contracting Officer, determined to be the most advantageous and in the best interest of the Smithsonian Institution.

Inquiries
Inquiries regarding this Request for Proposal should be directed via email to brayr@si.edu.

Interviews
It is the intention of the Smithsonian to interview a select group of responsive offerors; however, it is possible that interviews may not occur. Consequently, it is important that all responses to this request be complete and include all necessary information.

Submission of Proposals
The Smithsonian reserves the right to reject any or all proposals received in response to this request, and to negotiate separately with any offeror when such action shall be considered by the Contracting Officer to be in the best interest of the Smithsonian. After limited negotiations or based solely on initial offers received, notice will be provided indicating that an award may be made. It is therefore emphasized that all proposals should be submitted initially on the most favorable terms that the offeror can submit. Written proposals must be received 5:00 PM in the offeror’s time zone, on August 17 2015.

Disposition of Proposals
All information submitted in response to this Request for Proposal shall become the property of the Smithsonian and shall not be returned.

End.