

Statement of Work
Advancement Communications
Smithsonian Institution
Office of Advancement
May 10, 2021

INTRODUCTION

The Smithsonian Institution is a unique complex of 20 museums and galleries, the National Zoological Park, and 9 research centers. The Smithsonian is a national and world treasure and is dedicated to its founding mission, “the increase and diffusion of knowledge.” Its exhibitions, programs, collections, and outreach touch the lives of millions of Americans every year, as well as many who visit us from abroad.

The Smithsonian’s National Museum of Natural History seeks to understand the natural world and our place in it. We curate an irreplaceable archive of Earth’s physical, cultural, and biological diversity. Using the power of science, we illuminate the wonder and beauty of our planet. We explore fundamental questions, spark curiosity, and connect people everywhere to Earth’s unfolding story.

Our scientific collections are a critical long-term foundation for new knowledge. They provide researchers worldwide with an irreplaceable record of Earth’s ever-changing physical, biological, and cultural diversity. And they remind everyone of our planet’s beauty, wonder, and fragility.

Visitors see a small fraction of what we preserve; most of our 145 million-plus objects are maintained behind the scenes. They are studied by a cadre of Smithsonian scientists—as well as researchers from around the world—who conduct basic research about Earth, the species that depend upon it, the cultures that inhabit it, and the forces that now alter it. Their discoveries precede, underlie, and accelerate applied research in topics ranging from conservation and climate change to public health and food security.

The Office of Advancement oversees and guides the fundraising efforts of the museum and engages with staff in various departments in accomplishing their goals. The Annual Giving team, part of the Office of Advancement, has a requirement for a contractor to provide online marketing and fundraising support. The contractor will have experience with online marketing and fundraising strategy and best practices, particularly with producing content that acquires email addresses, and activates constituents to engage with content and donate. The contractor must have Blackbaud Convio Luminare Online experience, as well as experience working in a large, complex organization in which collaboration and multiple approvals are required.

The contractor is based in the National Museum of Natural History building on the National Mall in Washington, DC. Under the current circumstances, the museum is closed indefinitely, and therefore the contractor will be allowed to telework.

STATEMENT OF WORK

The contractor shall provide strategic, tactical, production and project management services to support and assist with online marketing initiatives for the Annual Giving Officer in the Office of Advancement. This position shall be paid a firm fixed hourly rate. The contract may be renewed or added to. The contract will require an average of 40 hours per week to complete the assignments. Work assigned may include but will not be limited to:

- Assist in strategy and production of online marketing campaigns for the Office of Advancement, including sourcing content ideas and assets, writing copy and producing emails, surveys and web pages, and producing, QCing and launching emails in the Blackbaud Convio Luminate Online platform;
- Manage the Office of Advancement email calendar, including producing engagement and fundraising email communications, producing the weekly eNewsletter, and coordinating with the Social Media Manager to produce social media engagement and fundraising posts;
- Collaborate with colleagues from the museum's Office of Education and Communications Department to produce engaging content for email newsletters that drives attendance to educational programming and broadens awareness of NMNH research and resources;
- Provide graphic design services to support marketing efforts on email, social media and web;
- Produce content for and update the Office of Advancement web pages;
- Maintain tracking and analytics documents for email campaigns.

DELIVERABLES

- Produce weekly NMNH eNews email newsletter
- Produce weekly NMNH public programs email newsletter
- Produce email invitations and RSVP web pages for Office of Advancement events
- Produce 3-4 GivingTuesday cultivation and fundraising emails
- Produce 6 holiday-related cultivation emails
- Produce 4 Gift Planning emails and email newsletters
- Produce graphics, user experience design for new quiz template
- Create graphics for Facebook advertising
- Produce content, emails, graphics, and web engagement opportunities for Fiscal-Year End Fundraising campaign
- Produce content, emails, graphics, and web engagement opportunities for Calendar Year-End Fundraising campaign
- Produce content, emails, graphics, and web engagement opportunities for Spring and Year-End Member Drives

PLACE OF PERFORMANCE

While the museum is currently closed, the selected contractor will perform a majority of the work at its own facility. The contractor may from time to time be required to visit in person at the Smithsonian Office of Advancement at the National Museum of Natural History in Washington, DC. When the museum reopens to staff, the contractor will work onsite at the office.

Ideal contractors will have the following qualifications:

- Expert understanding of nonprofit online marketing best practices;
- Expert proficiency with the Blackbaud Convio Luminare Online Platform, particularly the Email, Donation, Pagebuilder, Adobe Creative Suite, Survey and Constituent360 modules;
- Strong writing and graphic design skills, particularly creating content for mission-based organizations and getting constituents to take a desired action;
- Experience with web markup, including HTML5 and CSS3;
- Proficiency with the Drupal CMS platform;
 - Strong understanding of current web design, UX, and UI standards and trends as well as Web Accessibility implementation standards;
 - Understanding of responsive design, standards, and frameworks;
- Strong understanding of web analytics and related platforms (example: Google Analytics);
- Demonstrated quality assurance skills including meticulous attention to detail and experience with version control;
- Strong project management skills.

All vendor project team members will submit security forms and nondisclosure agreements to the Office of Advancement Human Resources department for clearance and access badges to the Smithsonian. All vendor programmers and quality control team members will be granted access to Smithsonian servers and all necessary IT functions. They will also be given temporary Smithsonian accounts which are to be used only for work pertaining to Office of Advancement projects. Upon completion of the project these accounts will be closed.

SUBMITTING YOUR QUOTE

Price quotes should be an all-inclusive flat fee for total available hours and include a breakdown of cost per hour. Submit quotes by electronic mail to Catherine McCusker at mccuskerc@si.edu. Quotes are due by the close of business two weeks from posting date. Quotes should contain the following information:

Plan of Accomplishment: Provide a narrative explanation addressing the technical competence, the technical vendor's capabilities, qualifications and approach to satisfy the requirements of this statement of work.

Previous Experience: Provide specialized experience and demonstrated technical competence in performing similar work as requested herein. Please provide examples of other organizations where you have provided similar services. Submit a summary of jobs for each example of similar efforts performed as well as one reference per job preferably completed within the last five years.

Price: Price should be submitted in the format of price per hour of labor. The price proposals shall be all-inclusive. Contractor shall be paid a firm fixed hourly rate.

Period of Performance

All project activities and deliverables will begin on or about July 22, 2021 through July 21, 2022.

Base Options and Periods: If, at the sole discretion of the Smithsonian Institution, a two-year term extension may be possible depending on available funding and need, the following options may be exercised:

Option Period 1: July 22, 2022 – July 21, 2023

Option Period 2: July 22, 2023 to July 21, 2024

Smithsonian Institution
Request for Quote: May 10, 2021 National Museum of Natural History

Request for Quote: Technical or Professional, Non-personal Services

This Request for Quote (RFQ) is issued by the National Museum of Natural History, Smithsonian Institution (SI), for technical professional, non-personal services to provide coordination services for the Office of Advancement in accordance with the Statement of Work (SOW).

I. SUBMITTING YOUR QUOTE

Price quotes may be submitted by *email*. Quotes are **due by 5:00 pm ET, on May 27, 2021** at:

Smithsonian Institution
Office of Advancement
Subject: Online Marketing and Fundraising Contract Submission
Email to: **Catherine McCusker @ mccusker@si.edu**

II. DESCRIPTION OF REQUIRED SERVICES

The National Museum of Natural History has a requirement for coordination services in support of the museum's online marketing and fundraising efforts. The award will be for a base period of one year – with two, one-year optional periods.

III. EVALUATION

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

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

A. Relevant Experience/Past Performance

1. Relevant experience is that obtained within the past 3 years providing or performing services of similar size, scope, complexity and type of client that indicates your suitability for this project, such as:
 - a. Experience in design, development, and implementation of email campaigns, including fundraising, engagement, and stewardship.
 - b. Marketing and communications: development and distribution of publicity for targeted audiences on social media.
 - c. Experience growing digital audiences and converting current and new

- email subscribers to donors.
 - d. Collaboration through productive and effective written and verbal communications, serving as a liaison to the museum's science community, Office of Education, Office of Exhibits, and Communications team.
 - e. Tracking and documenting timelines, tasks, and projects
 - f. Analysis of email campaign performance.
2. Past Performance should be indicated by a list of 3 current or previous employers and/or contracts with names of points of contact and their current telephone numbers who can answer specific questions on performance as it relates to this solicitation.

B. Qualifications/Technical Competence

1. **Technical Information** –Technical information should include a narrative discussion addressing the technical competence, the capabilities, qualifications, and approach to satisfy the requirements of the SOW.

C. Résumé (*See Section VII for legislative and administrative requirements that may apply to successful bidders' employees.*)

D. Price The price evaluation will cover pricing submitted for the base 12 months plus all additional option periods, with the intent to evaluate based on all periods. Price quote needs to reflect hourly rate and total cost for the Base Period and each consecutive Optional Period.

E. Meetings It is the intention of the Smithsonian to meet virtually with offerors who meet the evaluation factors listed above; however, it is possible that meetings may not occur. Consequently, it is important that all responses to this request be complete and include all necessary information.

IV. INSURANCE REQUIREMENTS

Prospective contractors are required to have General Liability Insurance coverage in the minimum amount of \$1,000,000 per occurrence for liabilities arising out of the contractor's activities pertaining to this contract. The SI must be listed as additional insured for the General Liability insurance. Proof of insurance must be submitted with quotes.

If you are the selected contractor and you do not have insurance and you do not wish to take out your own policy, you may elect to join the Smithsonian Institution's Commercial General Liability Policy for Contractors. The premium charged varies with the dollar amount of the contract.

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. 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 <https://sam.gov>. Questions regarding the process may be directed to the Federal Service Desk online at www.fsd.gov or via toll free call to 1-888-606-8220. There is no charge for registering in SAM.

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

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

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

- Vendors will need to obtain a DUNS number (see Part V. above) in order to register in SAM.
- Beginning on July 30, 2012, they must be directed to <https://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:

<https://www.e-verify.gov/>

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 other designated SI employee. Each form SF-87 must be returned to the COTR, or other designated SI employee, within ten (10) workdays from receipt of the forms by the Contractor. When necessary, the forms SF-87 shall be submitted by the Contractor with the OF-306.

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 the SI:

- Please submit as **one document named "LAST NAME_ Office of Advancement Contract"**

- 1) letter of interest that highlights your qualifications aligned with the tasks and deliverables described in the SOW,
- 2) current resume,
- 3) three references,
- 4) DUNS number and evidence of SAM registration. If you do not have a DUNS number and are not registered in SAM, you can start the process using the information provided in the RFQ. This is not required, but will expedite the process should your bid be selected.
- In a **separate document named “LAST NAME_PRICE QUOTE”**, please submit a price quote for the Base Year (first year) and four additional years. Both an hourly rate and annual total must be included.
- Please email these materials to mccuskerc@si.edu using the subject “Office of Advancement Contract Submission” **by due by 5:00 pm ET, on May 27, 2021.**
- Provide résumés of personnel that may be assigned to perform work under the anticipated award.
- Cite the date through which pricing submitted is valid.

ATTACHMENTS:

- Form SI-147A, Smithsonian Institution Purchase Order Terms and Conditions