

RFP 2008-12
March 28, 2008

REQUEST FOR PROPOSALS FOR CHANGE MANAGEMENT SERVICES

1. **INTRODUCTION.** The National Trust for Historic Preservation (“NTHP”) is soliciting competitive proposals for a fixed-price contract from firms that are qualified to provide change management consulting services related to PreservationNation.org, a newly launched technology platform. All consulting services will take place at NTHP headquarters located at 1785 Massachusetts Avenue, NW, Washington, DC 20036.

The initial contract will cover services beginning on April 25, 2008, and run for a one-year term; renewal options may be negotiated.

2. **DEADLINE FOR RECEIVING PROPOSALS.** Proposals will be accepted by the National Trust at its Headquarters in Washington D.C. **until 5:00 p.m. on Friday, April 11, 2008.**

3. **BACKGROUND.**

A. The National Trust for Historic Preservation is a non-profit membership organization bringing people together to protect, enhance and enjoy the places that matter to them. By saving the places where great moments from history – and the important moments of everyday life – took place, the National Trust for Historic Preservation helps revitalize neighborhoods and communities, spark economic development and promote environmental sustainability. With headquarters in Washington, DC, 9 regional and field offices, 29 historic sites, and partner organizations in all 50 states, the National Trust for Historic Preservation provides leadership, education, advocacy and resources to a national network of people, organizations and local communities committed to saving places, connecting us to our history and collectively shaping the future of America’s stories. For more information visit www.PreservationNation.org

B. To keep pace with recent changes in the way Americans communicate, the NTHP has embarked on **PreservationNation.org**: a virtual town square where people share proven tools, make connections, and get inspired to save historic places. To ensure true two-way conversations, PreservationNation.org is built on the Social Media (or Web 2.0) concepts of open information and communications, allowing users to participate in the dialogue through blogs, wikis, and other online tools. By repositioning and integrating existing offline

content and creating compelling new content using cutting edge technology, we hope to reach new audiences and communities. On February 29, 2008, NTHP launched www.PreservationNation.org, providing a CMS/e-CRM foundation for this work.

C. In preparation for www.PreservationNation.org, NTHP senior management and staff conducted an extensive communications effort to educate all staff about the goals and potential impact of PreservationNation. Highlights include the way PreservationNation changes in the way the NTHP achieves its mission, expands the NTHP's potential audience and the new technology needs that will be required to keep PreservationNation viable.

D. Through the work of the NTHP's staff working groups, internally administered staff surveys, individual conversations and large and small group discussions at our annual Staff Planning Week, we identified strengths and challenges in work structure and organizational culture related to the full implementation and use of www.PreservationNation.org. Identified strengths include the NTHP's educated workforce and entrepreneurial culture; weaknesses include PreservationNation's potential impact on programs that rely on publications and fee for services for their revenue, an uneven comfort level with technology among some staff, and a stretched infrastructure throughout the organization.

In two separate sessions, staff shared their feelings about the changes we face with the startup of PreservationNation. While the entire report will be provided, a few headlines include: fears about training and infrastructure as well as a lack of knowledge regarding the importance of the new platform.

E. Accordingly, we look to implement plans that enhance these strengths and neutralize any potential liabilities in the adoption and use of new technology embodied in PreservationNation and the changes in culture it represents.

4. SCOPE OF WORK. NTHP is soliciting proposals for a firm to provide the services, materials, equipment, facilities and personnel required to provide change management consulting services to assist NTHP in assessing needed change and developing a roadmap to implement those changes necessary for the effective use and support of www.PreservationNation.org as set out below.

The fundamental service elements should include the following, at a minimum:

Assessment Report

- Help define goals and expectations and clarify staff/management/consultant roles;
- Engage key stakeholders in the PreservationNation assessment process;

- Review PreservationNation staff working group findings as well as previously collected staff feedback ;
- Recommend other areas of potential change and implementation plans as needed; and
- Identify recommended priorities for structural and cultural change

Staff Planning Week Meetings

- Present preliminary assessment findings and initial recommendations to NTHP staff during Staff Planning Week , June 9 – June 13, 2008.
- Meet with selected staff, including regional office staff, during Staff Planning Week to identify recommended areas of change and recommendations; and
- Participate in a Staff Planning Week session to encourage feedback from staff.

Implementation Plan

- Following approval from NTHP of the recommendations from the assessment, develop an implementation plan with a timetable for addressing priorities, including the following;
 1. A general change management plan, to include:
 - a. Identification of training needs and implementation plan as needed;
 - b. Recommend processes for the engagement of key stakeholders; and
 - c. A framework for communicating all changes underway, potential impact on NTHP group work environments and employees.
 2. Provide guidelines on benchmarking and best practices;

5. **TIMETABLE.** The milestone dates related to this project are as follows:

Task / Deliverable	Completion Date
Proposals due	April 11, 2008
Contract award	May 2, 2008
Meet with Key Stakeholders	May 9, 2008
Draft Implementation Plan	May 30, 2008 (negotiable)
Draft Assessment Report	May 30, 2008
Participate in Staff Planning Week	June 9-13, 2008
Final Assessment Report and Implementation Plan due	October 31, 2008

6. GENERAL INSTRUCTIONS.

A. The National Trust would prefer that your proposal be submitted in .pdf format. Alternatively, two paper copies of your proposal may be submitted on the firm's letterhead. One paper copy must be unbound and suitable for duplication. Telephone and facsimile submissions will not be accepted.

B. Sales kits, brochures, samples or other materials related to the proposed services are welcome and may be provided as a component of your proposal. Please provide all such materials in duplicate. To have these materials returned to you, label each sample with your company name and address and provide a stamped and self-addressed return envelope.

C. Each proposal must contain the following information:

- i.** a qualifications statement and fee proposal which answers the questions regarding background and experience outlined in **Exhibit A**;
- ii.** a description of the professional qualifications of the team and its members;
- iii.** a statement of the prior work experience of the members of the team on other relevant projects;
- iv.** a timeline for completion of the work;
- v.** a statement that the proposal will be valid for a period of 60 days from the closing date;
- vi.** if consultants or subcontractors will be used, the name and address of such firms, together with a description of their area of responsibility;
- vii.** the name, address and telephone numbers of references who may be contacted concerning work done on comparable projects;
- viii.** a description of the legal status of the entity submitting the qualifications, i.e. sole proprietorship, partnership, limited liability company, joint venture or corporation, and state of residency or incorporation;
- ix.** the name, address and position of persons within the firm who are authorized to execute contracts on its behalf; and
- x.** a statement indicating whether or not the firm carries insurance in the following categories and the principal amount of all coverage maintained:

- a.** Workers' Compensation,
- b.** Employers' Liability,
- c.** Commercial General Liability

D. Your proposal should be addressed, as follows:

E: Tiffany_Hairston@nthp.org

Tiffany Hairston
National Trust for Historic Preservation
1785 Massachusetts Avenue, NW
Washington, DC 20036
"Proposal for Change Management Consulting Services (RFP
2008-12)"

7. CONTRACT AWARD.

A. In evaluating the proposals submitted in response to this RFP, the National Trust will consider the following factors:

- i. your location;
- ii. project methodology;
- iii. professional qualifications of individual team members;
- iv. the experience of the team members in working with comparable projects;
- v. the ability to complete the project within the time frame established;
- vi. a positive, can-do attitude of achieving goals while working in a cost effective manner;
- vii. the range of services offered and any limitations imposed;
- viii. your price; and
- ix. responses received from references.

B. The National Trust reserves the right, in the exercise of its sole discretion:

- i. to reject all proposals received;
- ii. to accept a proposal without further discussion or negotiation;
- iii. to reject an individual proposal because of defects, irregularities or provisions inconsistent with this RFP;
- iv. to waive any defect or irregularity in a proposal and to accept that proposal when it is otherwise proper and reasonable to do so; and
- v. to negotiate directly with respondents for other terms, prices and conditions deemed proper and reasonable for the completion of the work or to protect the interests of the National Trust.

8. CONTRACT CONDITIONS. Prospective vendors may provide a sample of their standard service agreement; however, the contract for this service will be prepared by the National Trust and will include, but not be limited to, the terms and conditions listed below. Please review these provisions carefully before deciding whether or not you wish to submit a proposal. These terms reflect the standard policies of the National Trust and exceptions may be considered only in limited circumstances. Firms unwilling to agree to these terms must note any objection in their proposals.

9. **SELECTION PROCEDURE.** The following procedure will be followed in selecting a vendor to meet these requirements:

A. Proposals submitted in response to this RFP will be accepted by the National Trust at its Headquarters Building in Washington D.C. **until 5:00 p.m. on Friday, April 11, 2008.**

B. The proposals received by that date will be evaluated by the National Trust. If necessary, interviews will be scheduled with these firms during the week of **April 14, 2008.**

C. It is anticipated that a vendor will be selected by **May 2, 2008.**

10. **FOLLOW-UP.**

A. If you have questions concerning the project or the technical specifications outlined in this RFP, please contact:

David Brown, Executive Vice President
David_Brown@nthp.org

B. If you have any questions concerning National Trust contract requirements and procedures, contact:

Tiffany Hairston, Contracts Office
Tiffany_Hairston@nthp.org

CONTRACT TERMS AND CONDITIONS

The contract awarded under this RFP will include, but is not necessarily limited to, the following terms and conditions:

1. Work for Hire. All reports or other publications developed by the contractor for the National Trust will be the exclusive property of the National Trust and will be copyrighted in the name of the National Trust.
2. Liability. The National Trust will not accept a proposal that seeks to limit the contractor's potential liability to the dollar value of the contract.
3. Trademark. The National Trust will permit the contractor to use certain National Trust trademarks and logos. However, any materials on which these marks appear will require the approval of the National Trust in advance of distribution.
4. Change in Control. The National Trust's selection will be based in part on the firm's reputation and its ability to provide competent service as it is presently owned, managed and operated. In the event that the firm is sold or management and operations are otherwise transferred to another company, the National Trust will have the option to terminate the contract without penalty.
5. Mutual Indemnification. The contract will include a mutual indemnification clause covering the acts, omissions, negligence, misconduct, and breach of any material condition of the contract by the indemnifying party, its directors, officers, employees, subcontractors and agents.
6. Funding. Financial support for the National Trust is provided by membership dues, endowment funds and contributions from private members and donors. It also receives matching grants from agencies of state and federal government. The funding required for the contract covered by this RFP will be provided by a grant from the J. Paul Getty Museum ("The Getty").
7. Equal Opportunity.
 - A. The National Trust is an equal opportunity employer. It maintains an Affirmative Action Plan as required by Executive Order 11246, as amended, and by the applicable implementing regulations issued by the Secretary of Labor (41 CFR 60-1). The firm selected for this contract will be expected to maintain similar policies and plans, and to comply with all applicable notice, reporting and compliance requirements, to the extent that they are required by the Executive Order and the implementing regulations.

B. The National Trust is committed to a policy of encouraging and promoting greater economic opportunities for minority and women-owned business enterprises and for small businesses. Small businesses and firms owned by minority interests and by women are encouraged to respond to this RFP. Prospective contractors are encouraged to include small businesses and minority- and women-owned businesses as subcontractors and suppliers.

Exhibit A
Qualifications Statement Questionnaire

Firm's Background

1. Your firm's full contact information (name, address, phone, fax, e-mail, contact person).
2. A description of your firm's legal status, i.e. sole proprietorship, partnership, limited liability company, joint venture or corporation, and state of residency or incorporation.
3. The name, address and position of persons within the firm who are authorized to execute contracts on its behalf.
4. A description of the history of your firm, its mission, and vision.
5. A statement indicating whether or not the firm carries insurance in the following categories and the principal amount of all coverage maintained:
 - A. Workers' Compensation,
 - B. Employers' Liability,
 - C. Commercial General Liability, and
 - D. Automobile Liability.

Firm's Experience

6. A description of the services and experience of your firm. In particular, describe your firm's experience with non-profit organizations.
7. A description of the professional qualifications of the members of the proposed project team, including resumes.
8. An organizational chart that identifies the project manager and the members of the team and clearly defines their respective roles and responsibilities.
9. If consultants or subcontractors will be used, the name and address of such firms, together with a description of their experience and area of responsibility.
10. The name, address and telephone numbers of at least four (4) references who may be contacted concerning work done by the firm on similar projects. Include:
 - A. the owner's name, contact person, address, and phone number; and
 - B. a description of the project, including contracting relationships and team members.

Individual Team Member Experience:

11. A description of each team member's qualifications, including resumes. In particular, describe each team member's experience with non-profit organizations.
12. The name, address and telephone numbers of references who may be contacted concerning work done by each individual team member on similar projects. Include:
 - A. the owner's name, contact person, address, and phone number; and
 - B. a description of the project, including contracting relationships and team members.

Fee Proposal

13. A description of the proposed approach to the project and a detailed account of

the individual steps required.

- 14.** A fee proposal for the work specified above.
- 15.** An allowance for reimbursable direct expenses such as travel expenses, long-distance communications, courier and expedited delivery service charges.
- 16.** A schedule of hourly rates for key members of the team for any work that might be performed above and beyond the Scope of Work as outlined.
- 17.** A project schedule or time line for the project showing the sequence you plan to follow and the dates for all important intermediate steps and for final deliverables (please include adequate time for NTHP review and approval).