

## ATTACHMENT A – INSTRUCTIONS

### PREPARE PROPOSAL IN ACCORDANCE WITH INSTRUCTIONS LISTED BELOW

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#### 1. Proposal Submission Requirements

The proposal shall consist of two separately bound sections, a technical proposal and a price proposal. **One (1) original and three (3) copies** of each must be submitted in sealed envelopes conspicuously marked: “Proposal in Response to Request for Quotation No. DCBX-2008-Q-0025: Strategic Action Plan.”

All proposals must be submitted on 8.5” by 11” paper and typewritten. Telephonic proposals will not be accepted unless otherwise directed in writing.

#### 2. Technical Proposal

This section shall be submitted under a separate cover titled “Technical Proposal.” The technical portion shall, at minimum, include the following:

##### 2.1 Technical Approach and Capacity

- a. Offeror shall provide a brief narrative which demonstrates its understanding of the District’s requirement and outlines its methodology for research and development of a long-range strategic plan to serve as a blueprint for arts and cultural advancement in the District of Columbia within the required timeframe.
- b. Offeror shall provide a brief narrative which demonstrates its knowledge of research and development of a long-range strategic plans.
- c. The Offeror shall demonstrate its ability in working the nonprofit arts community.
- d. The Offeror shall provide a work plan including project timeline and a staffing plan.
- e. Offeror shall provide resumes of proposed staff to be assigned to this project, documenting experience in accordance with the statement of work.

##### 2.2. Past Performance and Demonstrated Results

- a. The Offeror shall provide a list of, at minimum, three (3) client organizations for whom the Offeror has provided research and development services during the past two (2) years.
- b. The Offeror shall provide a narrative, describing its expertise and ability to implement activities in accordance with the statement of work.
- c. The Offeror shall provide a narrative, describing the services provided and the accomplishment achieved as a direct result of the recommendation provided by the offeror.
- d. The Offeror shall provide the point of contact and other relevant information for references.
- e. Offeror shall provide at least three (3) previous clients (preferably from government and nonprofit sectors) that have been successfully with the last three (3) years. The Offer’s submission shall indicate the name, address, and telephone number of clients that

requested such services. The Offeror shall have its client reference complete the attached Past Performance Evaluation Form (Attachment D) and **return the signed form directly to Angela Turner, Supervisory Contract Specialist via fax at 202-727-8843 or via email at [angela.turner@dc.gov](mailto:angela.turner@dc.gov) on or before July 16, 2008**

### 3. **Price Proposal**

This section shall be submitted under a separate cover titled “**Price Proposal**”. The offeror shall complete Attachment B – Price Schedule. Pricing shall include all costs for the service described in Attachment C – Statement of Work.

Offeror shall provide a breakdown of the labor categories and number of hours proposed. Pricing shall be a firm fixed price.

### 4. **Proposal Submission Date and Time**

Proposals must be submitted no later than **2 p.m. EST on Wednesday, July 16, 2008**. Offerors may submit proposals by mail, at the address below, by fax to 202-727-8843, or email to [Angela.turner@dc.gov](mailto:Angela.turner@dc.gov). Proposals, modifications to proposals, or requests for withdrawals that are received in the designated District office after the exact local time specified above, are "late" and shall be considered only if they are received before the award is made and one (1) or more of the following circumstances apply:

- (a) The proposal or modification was sent by registered or certified mail not later than the fifth (5th) day before the date specified for receipt of offers;
- (b) The proposal or modification was sent by mail and it is determined by the Contracting Officer that the late receipt at the location specified in the solicitation was caused by mishandling by the District, or
- (c) The proposal is the only proposal received.

#### 4.1 **Hand Delivery or Mailing of Solicitation**

Deliver or Mail to:  
Government of the District of Columbia  
Office of Contracting and Procurement  
441 4<sup>th</sup> Street, N.W., Suite 703 South  
Washington, D.C. 20001  
Attn: Angela Turner

**Email to:**  
[Angela.turner@dc.gov](mailto:Angela.turner@dc.gov)

## 4.2 Proposal Submission Date

The closing date for receipt of proposals is **July 16, 2008 by 2:00 p.m.** local time.

## 5. Evaluation for Award

The contract will be awarded to the responsible offeror whose offer is most advantageous to the District, based upon the evaluation criteria specified below. The District reserves the right to reject any or all proposals determined to be inadequate or unacceptable. The District may award a contract on the basis of initial offers received without discussions. Therefore, each initial offer should contain the offeror's best terms from a price and technical standpoint.

## 6. Proposal Evaluation

The District will evaluate proposals using the following criteria listed in descending order of importance:

### (a) Technical Approach and Capacity (25%)

- Offeror shall provide a brief narrative which demonstrates its understanding of the District's requirement and outlines its methodology for research and development of a long-range strategic plan to serve as a blueprint for arts and cultural advancement in the District of Columbia within the required timeframe.
- Offeror shall provide a brief narrative which demonstrates its knowledge of research and development of a long-range strategic plans.
- The Offeror shall demonstrate its ability in working the nonprofit arts community. The Offeror shall provide a work plan including project timeline and a staffing plan.
- Offeror shall provide resumes of proposed staff to be assigned to this project, documenting experience in accordance with the statement of work.

### (b) Oral Presentations (25%)

The District will hold Oral Presentations during which Offers shall verbally substantiate The experience and performance capabilities represented in the written proposals submissions. The Offeror shall make a formal thirty (30) minute presentation, which includes an overview of their proposed methodology and approach, timeframe, similar successful projects of comparable size and scope, and proposed staffing and qualifications. At the conclusion of the presentation, the Offeror shall participate in a thirty (30) minute Question and Answer session with the Contracting Officer (CO), Contracting Officer's Technical Representative (COTR) and members of the Technical Evaluation Panel. The District anticipates Offeror Presentations to be given by or to include, at minimum, the proposed Project Manager and/or Senior Team Leads.

Presentation will be held from 11AM to 3PM Thursday, July 17, 2008 and Friday, July 18, 2008; there will be no presentations scheduled between 12 Noon and 1PM either day. Timeslots will be assigned on a 'first-come, first-serve' basis. Please contact Angela Turner, Supervisory Contract Specialist via email ([Angela.turner@dc.gov](mailto:Angela.turner@dc.gov)) or phone (202)724-4052 to reserve a timeslot."

(c) **Past Performance and Demonstrated Results (30%)**

- The Offeror shall provide a list of, at minimum, three (3) client organizations for whom the Offeror has provided research and development services during the past two (2) years.
- The Offeror shall provide a narrative, describing its expertise and ability to implement activities in accordance with the statement of work.
- The Offeror shall provide a narrative, describing the services provided and the accomplishment achieved as a direct result of the recommendation provided by the offeror.
- The Offeror shall provide the point of contact and other relevant information for references.
- Offeror shall provide at least three (3) previous clients (preferably from government and nonprofit sectors) that have been successfully with the last three (3) years. The Offer's submission shall indicate the name, address, and telephone number of clients that requested such services. The offeror shall have its client reference complete the attached Past Performance Evaluation Form (Attachment D) and **return the signed form directly to Angela Turner, Supervisory Contract Specialist via fax at 202-727-8843 or via email at [angela.turner@dc.gov](mailto:angela.turner@dc.gov) on or before July 15, 2008**

(c) **Price (20%)**

The Offeror's pricing proposal will be evaluated separately from the technical proposal.

The price evaluation will be objective. The offeror with the lowest price will receive the maximum price points. All other proposals will receive a proportionately lower total score. The District will use the total estimated maximum in the calculation. The following formula will be used to determine each offeror's evaluated price score:

$$\begin{array}{l} \text{Lowest price proposal} \\ \text{-----} \end{array} \times 20 = \text{Evaluated price score}$$

Price of proposal being evaluated

The technical evaluation criteria above serve as the standard against which all proposals will be evaluated and serve to identify the significant areas which the offeror should specifically address in complying with the requirements in the Scope of Work. The technical proposal and price proposal shall be evaluated separately.

## ATTACHMENT B – PRICE SCHEDULE

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- B.1** Pricing shall be firm fixed price and inclusive of all costs, including administrative and overhead costs.
- B.2** The District contemplates award of a firm fixed price contract.

Contract Line Item No. (CLIN)	Item Description	Price Per Unit	Unit Price	Extended Price
0001	Research and Development Services	1	Job	\$ _____

# ATTACHMENT D – PAST PERFORMANCE EVALUATION FORM

(Check appropriate box)

Performance Elements	RATING (See Rating Guidelines on Page 2)					
	5 – Excellent	4 – Good	3 – Acceptable	2 – Minimally Acceptable	1 – Poor	0 – Unacceptable
Quality of Services/ Work						
Timeliness of Performance						
Cost Control						
Business Relations						
Customer Satisfaction						

1. Name of Contractor being Evaluated: \_\_\_\_\_
2. Name & Title of Evaluator: \_\_\_\_\_
3. Signature of Evaluator: \_\_\_\_\_
4. Name of Evaluator's Organization: \_\_\_\_\_
5. Telephone Number of Evaluator: \_\_\_\_\_
6. Type of service received: \_\_\_\_\_  
(Continue on separate sheet if needed)
7. Period of Performance: \_\_\_\_\_
8. Remarks on excellent performance: Provide data supporting this observation. (Continue on separate sheet if needed)  
\_\_\_\_\_  
\_\_\_\_\_
9. Remarks on unacceptable performance: Provide data supporting this observation. (Continue on separate sheet if needed)  
\_\_\_\_\_  
\_\_\_\_\_

## RATING GUIDELINES

Summarize Contractor performance in each of the rating areas. Assign each area a rating of 0 (Unacceptable), 1 (Poor), 2 (Minimally Acceptable), 3 (Acceptable), 4(Good), or 5 (Excellent). Use the following instructions as guidance in making these evaluations.

	<b>Quality of Service/ Work</b>	<b>Cost Control</b>	<b>Timeliness of Performance</b>	<b>Business Relations</b>
	<ul style="list-style-type: none"> <li>-Compliance with contract requirements</li> <li>-Accuracy of reports</li> <li>-Appropriateness of personnel</li> <li>-Technical excellence</li> </ul>	<ul style="list-style-type: none"> <li>-Within budget (over/ under target costs)</li> <li>-Current, accurate, and complete billings</li> <li>-Relationship of negated costs to actual</li> <li>-Cost efficiencies</li> <li>-Change order issue</li> </ul>	<ul style="list-style-type: none"> <li>-Meet Interim milestones</li> <li>-Reliable</li> <li>-Responsive to technical directions</li> <li>-Completed on time, including wrap-up and contract administration</li> <li>-No liquidated damages assessed</li> </ul>	<ul style="list-style-type: none"> <li>-Effective management</li> <li>-Businesslike correspondence</li> <li>-Responsive to contract requirements</li> <li>-Prompt notification of contract problems</li> <li>-Reasonable/cooperative</li> <li>-Flexible</li> <li>-Pro-active</li> <li>-effective contractor recommended solutions</li> <li>-Effective snail/small disadvantaged business Subcontracting program</li> </ul>
<b>0. Unacceptable</b>	Nonconformances are comprises the achievement of contract requirements, despite use of Agency resources	Cost issues are comprising performance of contract requirements.	Delays are comprising the achievement of contract requirements, Despite use of Agency resources.	Response to inquiries, technical/ service/administrative issues is not effective and responsive.
<b>1. Poor</b>	Nonconformances require major Agency resources to ensure achievement of contract requirements.	Cost issues require major Agency resources to ensure achievement of contract requirements.	Delays require major Agency resources to ensure achievement of contract requirements.	response to inquiries, technical/ service/administrative issues is marginally effective and responsive.
<b>2. Minimally Acceptable</b>	Nonconformances require minor Agency resources to ensure achievement of contract requirements.	Costs issues require minor Agency resources to ensure achievement of contract requirements.	Delays require minor Agency resources to ensure achievement of contract requirements.	Responses to inquiries, technical/ service/administrative issues is somewhat effective and responsive.
<b>3. Acceptable</b>	Nonconformances do not impact achievement of contract requirements.	Cost issues do not impact achievement of contract requirements.	Delays do not impact achievement of contract requirements.	Responses to inquires, technical/ service/administrative issues is usually effective and responsive.
<b>4. Good</b>	There are no quality problems.	There are no cost issues.	There are not delays.	Responses to inquiries, technical/ service/administrative issues is effective and responsive,
<b>5. Excellent</b>	The contractor has demonstrated an exceptional performance level in some or all of the above categories.			

**ATTACHMENT C  
STATEMENT OF WORK  
LONG-RANGE STRATEGIC ACTION PLAN  
2009 TO 2013**

**1. SCOPE**

The DC Commission on the Arts and Humanities (DCCAH) is seeking an experienced Arts Contractor to work over the next twelve months to research and develop a long-range strategic action plan to serve as a blueprint for arts and cultural advancement in the District of Columbia from FY 2009 through FY 2013, as outlined in Section II. The Contractor shall work with DCCAH's Executive Director, Assistant Director (project lead), agency staff, and Commissioners throughout the process to design and implement an effective strategic planning process. The resulting plan shall encompass a thoughtful and creative process grounded in the agency's mission, organizational capacity, resources, and legislative authority.

**2. BACKGROUND**

**A. Overview**

The DCCAH, a public agency, is well positioned to examine a variety of strategic opportunities for the future. Established in 1968 by the DC Law 1-22, the DCCAH is the official government agency for arts and culture in the District of Columbia under the purview of the Deputy Mayor for Planning and Economic Development. It is governed by eighteen private residents who serve as the governing body and final grant funding authority for the agency. Each Commissioner is appointed by the Mayor and approved by the Council of the District of Columbia. The agency is comprised of a professional staff, assisted regularly by peer review panelists and a host of volunteers. The DCCAH's mission is *to provide grants, programs and education activities that encourage diverse artistic expressions and learning opportunities, so that all District of Columbia residents and visitors can experience the rich culture of our city*. DCCAH programs support and promote stability, vitality and diversity of artistic expression. Through its grants programs, agency services, and special initiatives, the DCCAH strives to achieve the following goals:

- Increase access to and awareness of the arts for all District residents
- Promote arts education in the public schools
- Support arts learning opportunities for all ages
- Build community through the arts
- Create and strengthen partnerships in the arts
- Preserve and highlight the District's cultural diversity and heritage

**B. Objectives**

In line with Mayor Adrian M. Fenty's vision of Washington, DC as a *World Class Cultural City*, the plan will bring together the arts and cultural elements of the city in order to:

1. Re-evaluate the vision, mission, and values of the DCCAH to meet the growing needs of District of Columbia residents.

2. Examine significant social and economic variables including:
  - a. The changing demographic make-up of the District of Columbia's population.
  - b. The health of the non-profit arts community in the current environment.
  - c. The creative economy and its potential impact on arts participation and funding.
  - d. Continuing advances in technology, the proliferation of computers as business tools, and the impact of new technologies on communication.
  - e. Trends in education decision-making and practices at the local level.
  - f. Political issues such as public attitudes toward government support of the arts and the growing perception of the arts as a solution to social problems and civic needs.
3. Evaluate new and existing partnerships, collaborations, and networking opportunities in the arts.
4. Reassess Commission priorities and strategies in light of research findings and data review.
5. Establish goals and objectives, and develop strategies for 2009 through 2013.
6. Develop performance indicators and accountability measures to monitor progress for achieving goals and objectives.

### **3. REQUIREMENTS**

#### **3.1 Tasks**

- 3.1.1** The Contractor shall provide a Project Director who will be responsible for all activities required in accordance with the statement of work. The Contractor shall work with the Contracting Officer's Technical Representative (COTR) to identify the requirements for the Research and Development of a Strategic Action Plan.
- 3.1.2** The Contractor shall develop a work plan and timetable to produce a draft plan two (2) weeks after award of the contract.
- 3.1.3** The Contractor shall articulate research questions and design a Constituent Survey to submit to COTR for approval.
- 3.1.4** The Contractor shall conduct a visioning session for the Commission board and staff. The Contractor shall submit to the COTR notes from the visioning session for the Commission and staff.
- 3.1.5** The Contractor shall facilitate planning sessions, conduct interviews, and focus discussions with constituent groups and stakeholders as identified by DCCA.
- 3.1.6** The Contractor shall oversee and coordinate data collection.
- 3.1.7** The Contractor shall compile, analyze, and synthesize the data collected.
- 3.1.8** The Contractor shall coordinate program evaluations by program directors and planning coaches.
- 3.1.9** The Contractor shall coordinate and facilitate public meetings to solicit input on the draft strategic plan.

**3.1.10** The Contractor shall submit biweekly Project Status Reports to DCCAH.

**3.1.11** The Contractor shall submit draft written Long-Range Strategic Plan to the DCCAH for approval by the Board, no later than October 30, 2008.

**3.1.12** The Contractor shall submit a final Long-Range Strategic Action Plan after the draft plan has been reviewed and approved.

**3.2 Reporting**

**3.2.1** The Contractor shall submit to the COTR bi-weekly to the COTR, to ensure contract compliance and to monitor progress.

**4. DELIVERABLES AND SUBMITTALS**

<b>CLIN</b>	<b>Deliverables</b>	<b>Format/Method</b>	<b>Due Date</b>
<b>0001</b>	Draft Work plan in accordance with Section 3.1.2.	One (1) electronic copy in writing One (1) hard color copy	Two (2) weeks from the date of the contract award.
<b>0002</b>	Constituent Survey in accordance with Section 3.1.3.	One (1) electronic copy in writing One (1) hard color copy	Within one month of the date of the contract award.
<b>0003</b>	Bi-weekly Project Status Report in accordance with Section 3.1.10.	One (1) electronic copy in writing	By the 15 <sup>th</sup> and 30 <sup>th</sup> of each month during the performance of the contract.
<b>0004</b>	Notes of visioning session for the Commission board and staff. In accordance with Section 3.1.4.	One (1) electronic copy in writing One (1) hard color copy	Dated given by the COTR.
<b>0005</b>	Draft of Long-range Strategic Plan in accordance with Section 3.1.11.	Ten (10) electronic copy in writing Ten (10) hard color copy	By October 30, 2008.

6) Conduct public meetings to solicit input on draft long-range Strategic Plan in accordance with Section 3.1.9.	At least four (4) open meeting(s) in DCCAH designated spaces	December 1, 2008 – January 30, 2009.
7) Produce final written plan. (Section III. B.12)	Ten (10) electronic copy in writing Ten (10) hard color copy	By February 27, 2009.

**5. PERIOD OF PERFORMANCE**

The period of performance will be date of award through one year thereafter.

**6. KEY DATES/SCHEDULE**

February 2008 Mar. 2008 – Apr. 2008 May 2008 June – July 2008	Execution of contract Data collection & environmental scan Commission and staff planning retreat Conduct planning sessions with constituent to obtain feedback
August 2008 September 2008 October 2008 November 2008 Dec. 2008 – January, 2009 February 2009	Report on preliminary findings Development of draft plan Delivery of draft plan Commission review and approval of draft plan Public comment period Commission adoption of final plan

**6. ATTACHMENT(S)**

- Attachment A: Current Long-range Strategic Plan (2004-2008)
- Attachment B: DC-Law 1-22 (Enabling Legislation)
- Attachment C: Board By-laws
- Attachment D: DC 6-125 Public Art Legislation