

**Request for Quote**

**Bid # 19-MUS-0001**

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| **For:** | New Jersey State Museum  Strategic Planning Consultant |

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| --- | --- | --- |
| **Event** | **Date** | **Time** |
| **Vendor’s Electronic Question Due Date**  (Refer to {[RFQ} Section 1.3.1](#_1.3.1_ELECTRONIC_QUESTION_AND ANSWE) for more information.) | September 7, 2018 | 2:00 PM |
| **Quote Submission Date**  (Refer to {[RFQ} Section 1.3.2](#_1.3.3__Mandatory_Pre-Bid Conference) for more information.) | October 5, 2018 | 2:00 PM |

Dates are subject to change. All times contained in the Bid Solicitation {RFQ} refer to Eastern Time. All changes will be reflected in Bid Amendments {Addenda} to the RFQ will be sent via email.

Bid Solicitation {RFQP} Issued By Using Agency

State of New Jersey State of New Jersey

Department of State Department of State

Division of Administration New Jersey State Museum

33 West State Street, 4th Floor 205 West State Street

Trenton, New Jersey 08625‑0459 Trenton, NJ 08625-0530

Date: August 20, 2018

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**Price Schedule/Sheet**

[**Vendor Checklist**](https://www.nj.gov/treasury/purchase/forms/Waiver%20and%20DPA%20Contract%20Checklist.pdf)

# INFORMATION FOR VENDORS {BIDDERS}

## PURPOSE AND INTENT

This Request for Quote {RFQ} is issued by the Department of State, Division of Administration on behalf of the New Jersey State Museum (NJSM). The purpose of this RFQ is to solicit Quotes from Vendors for consulting services to assist the NJSM in reviewing its organizational health and mission, and in developing a five (5) year strategic plan, evaluation methods and guidelines for increasing diversity.

The intent of this RFQ is to award a Purchase Order (Blanket P.O.) to that responsible Vendor whose Quote, conforming to this RFQ is most advantageous to the State, price and other factors considered.

The State of NJ Standard Terms and Conditions (SSTC) accompanying this RFQ will apply to all Blanket P.O.s made with the State of New Jersey. These terms are in addition to the terms and conditions set forth in this RFQ and should be read in conjunction with them unless the Bid Solicitation RFQ specifically indicates otherwise.

## BACKGROUND

This is a new Blanket P.O. for the NJSM. The NJSM, located in Trenton, NJ, is one of the largest museums in the state. A general museum with collections, exhibitions, programs, and research in Archaeology & Ethnography, Cultural History, Fine Art and Natural History was established in 1895 with education at the core of its mission. Education remains central to the Museum’s mission to this day. The Museum collections number over 2.3 million artifacts, specimens and objects. The Museum serves approximately 150,000 people (40% of that figure is school group attendance) per year through long-term and changing exhibitions, education programs, research inquiries and space rentals. The Museum is a division of the New Jersey Department of State (DOS).

**Current Core Mission Statement**: *As a center of cultural, educational, and scientific engagement, the New Jersey State Museum inspires innovation and lifelong learning through collections, research, exhibitions and programs in science, history and art. New Jersey State Museum engages visitors of all ages and diverse backgrounds in an exploration of New Jersey’s cultural and natural history presented within a global content, fosters state pride, and serves as a cultivator of tomorrow’s leaders.*

The NJSM is currently concluding its 2012-2018 Strategic Plan. Many positive outcomes have been realized under this plan, while several goals have been put on hold because they are too ambitious for the current capacity of the Museum. Additionally, the development of the plan did not engage the Museum’s community in substantive ways.

### ELECTRONIC QUESTION AND ANSWER PERIOD

The Division will electronically accept questions and inquiries from all potential Vendors via email sent to Barbara Bower at [Barbara.bower@sos.nj.us](mailto:Barbara.bower@sos.nj.us)

1. Questions should be directly tied to the RFQ and asked in consecutive order, from beginning to end, following the organization of the RFQ; and
2. Each question should begin by referencing the RFQ page number and section number to which it relates.

The cut-off date for electronic questions and inquiries relating to this RFQ is indicated on the RFQ cover sheet. In the event that questions are posed by Vendors, answers to such questions will be issued by Bid Amendment. Any Bid Amendment to this RFQ will become part of this RFQ and part of any Blanket P.O. awarded as a result of this RFQ. Bid Amendments to this RFQ, if any, will be sent to all potential bidders via email.

#### EXCEPTIONS TO THE STATE OF NJ STANDARD TERMS AND CONDITIONS (SSTC)

**Questions regarding the SSTC and exceptions to mandatory requirements must be posed during this Electronic Question and Answer period and shall contain the Vendor’s suggested changes and the reason(s) for the suggested changes.**

### SUBMISSION OF QUOTES

In order to be considered for award, the Quote must be received by the Department of State, Division of Administration at the appropriate location by the required time. Vendors shall submit a Quote via mail at the following address:

|  |  |
| --- | --- |
| **DATE: October 5, 2019** | **TIME: 2 pm** |

|  |  |
| --- | --- |
| **LOCATION:** | **In Person or FedEx/UPS Submittal by Regular Mail (USPS)**  **Jacqueline Kemery, CFO Jacqueline Kemery, CFO**  **NJ Department of State NJ Department of State**  **Division of Administration Division of Administration**  **33 West State Street, 4rd Floor PO Box 459**  **Trenton, NJ 08608 Trenton, NJ 08625-0459** |

**QUOTES NOT RECEIVED PRIOR TO THE QUOTE OPENING DEADLINE SHALL BE REJECTED. THE DATE AND TIME OF THE QUOTE OPENING ARE INDICATED ON THE RFQ COVER SHEET.**

**NO FAX OR EMAILED PROPOSALS WILL BE ACCEPTED.**

Note: A Vendor using U.S. Postal Service regular or express mail services should allow additional time since the U.S. Postal Service does not deliver directly to the Division. A Vendor should make every effort to submit its Quote well ahead of the Quote submission deadline to mitigate unforeseen delays or issues. The Vendor is solely responsible for the timely submission of its Quote in response to this RFQ.

## ADDITIONAL Information

### BID AMENDMENTS: Revisions to this rfq

In the event that it becomes necessary to clarify or revise this RFQ such clarification or revision will be by Amendment. Any Amendment to this RFQ will become part of this RFQ and part of any Blanket P.O. awarded as a result of this RFQ.

It is the sole responsibility of the Vendor to be knowledgeable of all Bid Amendments related to this RFQ.

### VENDOR Responsibility

The Vendor assumes sole responsibility for the complete effort required in submitting a Quote in response to this RFQ. No special consideration will be given after Quotes are opened because of a Vendor’s failure to be knowledgeable as to all of the requirements of this RFQ.

### COST Liability

The State assumes no responsibility and bears no liability for costs incurred by a Vendor in the preparation and submittal of a Quote in response to this RFQ.

# SCOPE OF WORK

The New Jersey State Museum is seeking an experienced firm to guide us in examining our organizational health including institutional cohesion, reviewing our mission, developing a 5-year strategic plan which includes strategies for increasing diversity, and creating methodologies for evaluation and assessment of Museum activities in order to make meaningful and informed decisions about our future goals and programming.

## PROJECT SCOPE

The Museum is seeking assistance in setting realistic strategic goals and developing methods for evaluating effectiveness. The successful firm will identify and analyze data from both internal and external environments, will assist the Museum in a thoughtful interpretation of the data and will help the Museum in identifying specific institutional, strategic and evaluation plans.

## PLANNING APPROACH REQUIREMENTS

The Museum has held accreditation by the American Alliance of Museums (AAM) since 1974. The Museum’s most recent application for accreditation has been table by AAM’s Accreditation Commission. To earn accreditation, the Museum must demonstrate to the Commission that we are actively engaging in integrated organizational and strategic planning, performing evaluation of programs to ensure relevance to our audiences, and working towards increasing diversity among leadership, staff and audiences. As part of the tabling re-submission, the Museum must demonstrate to the AAM Commission that it is engaging in, and committed to, systematic and integrated planning, which includes the following:

1. The Museum prioritizes building institutional cohesion in alignment with its mission and strategic plan;
2. The Museum’s planning process includes formative and summative evaluations which the Museum will use to guide its decisions;
3. The Museum’s planning process involves the institution as a whole and considers the perspectives of internal and external constituents groups;
4. The Museum’s planning is based on a sound understanding of its current capacity. The Museum’s plans anticipate the possible impact of fluctuations in the Museum’s State appropriation, earned revenue or NJ State Museum Foundation support.
5. Museum defines actions to encourage diversity in leadership and staffing (paid and unpaid), as well as input from, and participation by, diverse communities.

The resulting plan will align the Museum’s vision, mission, priorities and resources. This will give the Museum the tools to address these key questions:

1. Whom do we serve?
2. Are our services relevant to our current or potential audiences?
3. Who are we now? Where do we want to go?
4. How will we get there? What actions do we need to take to improve?
5. How will we assess improvements and success?
6. How do we reflect the diversity of our constituents?

The Museum must submit a progress report to the American Alliance of Museum by August 17, 2018 that details efforts made to correct deficiencies noted by the accreditation site visit team. This RFQ will be included in the submitted report. The Accreditation Commission will review the report at its October 2018 meeting. The Museum’s final report may be due in advance of the Commission’s June 2019 meeting, however a specific final report due date will be assigned after the Commission reviews the progress report.

# QUALIFICATIONS EXPERIENCE CRITERIA

The quote verbiage must describe the firm’s qualifications to provide the requested products and/or services, and include the following:

1. Description of the nature of the firm’s business; include a description of experience, competencies, and overall organizational capabilities.
2. Corporate organization chart indicating key management team members.
3. Number of years in business.
4. Description of the firm’s capabilities to provide the requested products(s)/service(s).
5. Description of the project staff structure, the background, qualifications and relevant experience of all staff involved in the project, including length of time at contractor; include the responsibilities that each staff member will have during the executive of this project.
6. Overview of approach and description of methodology to be used.
7. Description of project structure and detailed project timelines and phases (if applicable).
8. References: The proposer must provide three (3) independent references from three (3) different projects of similar scope, nature and complexity to that requested by the Museum. The Museum prefers multidisciplinary museums or cultural institutions, particularly those with a government parent references, but will consider other related entity references. Each of the references must include the following information:
9. Entity Name
10. Industry Type
11. Address, City, Province/State/Country
12. Contact Name, Title, Phone Number, and Email Address
13. Year(s) service(s) provided
14. Comments (include details regarding the current status of the product/service provided by proposer).

## Resumes

Detailed resumes shall be submitted for all management, supervisory, and key personnel to be assigned to the P.O. Resumes should emphasize relevant qualifications and experience of these individuals in successfully completing P.O.s of a similar size and scope to those required by this RFQ. Resumes should include the following:

1. The individual's previous experience in completing each similar P.O.;
2. Beginning and ending dates for each similar P.O.;
3. A description of the P.O. demonstrating how the individual's work on the completed P.O. relates to the individual's ability to contribute to successfully providing the services required by RFQ; and

With respect to each similar P.O., the name and address of each reference together with a person to contact for a reference check and a telephone number.

# QUOTE PREPARATION AND SUBMITTAL

## QUOTE CONTENT

The Quote should be submitted in three (3) volumes with the content of each volume as indicated below.

1. Volume 1

Section 1 - Forms and Financial Capability

1. Volume 2

Section 2 - Timeline

Section 3 – Project Methodology, Firm Experience and Qualifications

Implementation Schedule, Implementation and/or delivery schedule,

Relevant References; and

Section 3A - Any other miscellaneous documents to be included by the Vendor.

1. Volume 3

Section 4 – Price Schedule.

# DELIVERABLES AND FINAL ACCEPTANCE

A final written report to include, but not limited to: mission statement, 5-year strategic plan and evaluation strategies is expected to be received no later than September 30, 2019.

Interim report deadlines to be determined with successful proposer, with one interim report due on March 30, 2019.

# SELECTION AND PURCHASE ORDER AWARD

Quotes shall be evaluated based on the requirements set forth in the RFQ. Selection of the firm(s) will be at the discretion of the Museum and will be based on the quote that the Museum deems to be the most responsive and responsible and serves the best interests of the Museum. It is the intent of the Museum to negotiate and enter into a contract with the selected firm following a Notice of Intent of selection.

Quotes will be reviewed by a selection committee and will be evaluated based on the following criteria, which are listed in descending order of importance:

* 1. Project Methodology and Structure.
     1. Description of the approach, methodology and project structure to be used to satisfy the Museum’s project scope and objectives.

1. Firm Experience and Qualifications
   * 1. Experience with projects of similar type and scope in the past 5 years.
     2. Experience with museums, particularly AAM accredited institutions
     3. Experience with public sector organizations
2. Implementation and/or delivery schedule
   * 1. Proposed timeline reasonableness and responsiveness to project’s intended outcomes.
3. Financial Quote
   * 1. Total cost to Museum as it relates to the services.
4. Financial Viability
   * 1. Contractor’s ongoing financial viability to provide services to the Museum.
5. Relevant References
   * 1. Feedback from submitted references.

## Oral Presentation and/or Clarification of Quote

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After the Quotes are reviewed, one (1), some or all of the Vendors may be asked to clarify certain aspects of its Quotes. A request for clarification may be made in order to resolve minor ambiguities, irregularities, informalities or clerical errors.

Selected vendor may be required to make on-site oral and visual presentations or demonstrations at the request of the Museum. The Museum will schedule the time and location for any presentations. Costs and equipment for such presentations are the responsibility of the proposer. Best and Final offers may be solicited from the pool of finalists prior to selection of the successful firm.

## Financial Capability of the Vendor {Bidder}

In order to provide the State with the ability to judge the Vendor’s {Bidder’s} financial capacity and capabilities to undertake and successfully complete the Blanket P.O. {Contract}, the Vendor {Bidder} should submit opined certified financial statements in accordance with applicable standards by a Certified Public Accountant which include a balance sheet, income statement, and statement of cash flow, and all applicable notes for the most recent calendar year or the Vendor’s {Bidder’s} most recent fiscal year. If certified financial statements are not available, the Vendor {Bidder} should provide either a reviewed or compiled statement from an independent accountant setting forth the same information required for the certified financial statements, together with a certification from the Chief Executive Officer and the Chief Financial Officer, that the financial statements and other information included in the statements fairly present in all material respects the financial condition, results of operations, and cash flows of the Vendor {Bidder} as of, and for, the periods presented in the statements. In addition, the Vendor {Bidder} should submit a bank reference.

If the information is not supplied with the Quote {Proposal}, the State may still require the Vendor {Bidder} to submit it. If the Vendor {Bidder} fails to comply with the request within seven (7) business days, the State may deem the Quote {Proposal} non-responsive.

A Vendor {Bidder} may designate specific financial information as not subject to disclosure when the Vendor {Bidder} has a good faith legal/factual basis for such assertion. A Vendor {Bidder} may submit specific financial documents in a separate, sealed package clearly marked “Confidential-Financial Information” along with the Quote {Proposal}.

The State reserves the right to make the determination to accept the assertion and shall so advise the Vendor {Bidder}.

# REQUIRED FORMS

The vendor with the winning quote must submit the following forms which are included in the **Information Sheet and Checklist for Waivers and Delegated Purchasing Authority (DPA) Transactions** prior to the award of a purchase order. [**http://www.state.nj.us/treasury/purchase/forms/Waiver%20and%20DPA%20Contract%20Checklist.pdf**](http://www.state.nj.us/treasury/purchase/forms/Waiver%20and%20DPA%20Contract%20Checklist.pdf)

1. **State of New Jersey Standard Terms and Conditions**
2. **Ownership Disclosure Form**
3. **Disclosure of Investigations and Actions Involving Bidder Form**
4. **Disclosure of Investment Activities in Iran Form**
5. **Source Disclosure Certification Form**
6. **MacBride Principles Certification Form**
7. **Vendor Certification and Political Contribution Disclosure Form**
8. **Two Year Chapter 51 / Executive Order 117 Vendor Certification & Disclosure of Political Contributions Form**
9. **Affirmative Action Supplement Form**

Vendors must be registered with ***NJSTART.*** Vendors who are not already registered should go to <https://www.njstart.gov> to complete their registration.

# PRICE SHEET INSTRUCTIONS

The Vendor shall submit a firm fixed price for all price lines on the attached Price Sheet.

For evaluation purposes vendors will be ranked from the lowest to the highest according to the total Quote price located on the Price Sheet.

**PRICE SHEET**

**New Jersey State Museum**

**Strategic Planning Consultant**

**19 MUS 0001**

**Vendor is to complete all information in the designated blue areas below.**

|  |  |
| --- | --- |
| **Vendor Name:** |  |
| **Vendor NJSTART #:** |  |
| **Vendor FEIN#:** |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Price Line #** | **Description** | **Unit** | **Firm Fixed Cost** |
| 1 | Bidder is to provide an all-inclusive price to complete this project. | 1 | $0.00 |