

# **REQUEST FOR PROPOSALS**

## **Rhode Island Historic Preservation Conference Analysis/Recommendations**

**ISSUE DATE: November 1, 2021**

## I. INTRODUCTION

The Rhode Island Historical Preservation and Heritage Commission (RIHPHC) and Preserve Rhode Island (PRI) seek a professional organizational consultant to produce an analysis of and recommendations for the [Rhode Island Historic Preservation Conference](#) (“the Conference”) in order to assess its relevance and effectiveness and to guide the RIHPHC in how or if to offer a Conference program in the future.

The RIHPHC is the state agency for historical preservation and heritage programs. PRI is the statewide preservation advocacy non-profit. The two organizations collaborate on joint projects such as the Conference, which is organized by the RIHPHC, with PRI serving as the fiscal agent.

The Conference originated in 1986 as a statewide gathering of local historic district commissioners. Over the years, it has evolved into an annual event of more general interest to historic preservationists and the wider public. The Conference has provided an opportunity for Rhode Island preservationists to network, share ideas, present recent projects, and discuss new challenges in the field. It has become one of RIHPHC’s signature public programs.

The rapidly changing landscape of historic preservation programming is the backdrop for this project. There are new formats (like “unconferences”) and new platforms (like virtual conferences). An increasing number of organizations—local, national, and international—are producing historic preservation programming for the general public. With the increase of virtual programming amplified as a result of the COVID-19 pandemic, preservationists have much more content available than they did just two years ago.

The Conference has evolved gradually, for instance adapting new technologies (such as online registration) and new income sources (such as sponsorships). With much deliberation and effort, RIHPHC responded to COVID-19 by cancelling the 2020 conference and presenting a virtual Conference in 2021.

Another context for this project derives from three new organizational plans for the RIHPHC. In the past two years, the RIHPHC has produced a Strategic Plan, a State Preservation Plan, and an element of the State Guide Plan. With “Outreach” identified as a key goal of the agency, we have a unique opportunity to assess how the Conference can help the agency realize its objectives.

Finally, many historic preservation organizations are taking a hard look at how the field both reflects and perpetuates inequality in the larger culture. One of the goals in the RIHPHC’s State Preservation Plan is “Prioritize equity and representation to ensure that the historic resources we recognize, preserve, protect, and celebrate reflect Rhode Island’s diverse heritage.” As a key public program of the RIHPHC, the Conference must continue to help us meet this goal.

## II. GOALS

The goals of this study are to:

1. Assemble data and carry out a detailed analysis of the Rhode Island Historic Preservation Conference (budget, attendance, program content, partnerships, staffing, administration), examining past conferences (selected in consultation with RIHPHC) in order to answer questions such as:
  - a. How has attendance changed over time, in terms of number of attendees, types of attendees (e.g., preservation professionals vs. volunteers), and geographic distribution?
  - b. How has the budget changed over time, and how much of the Conference expenses are covered by grants, sponsorships, and registration fees? How has the budget impacted management of the Conference?
  - c. How have the Conference program offerings evolved over time?
  - d. How have the time demands on RIHPHC staff, consultants, fiscal agents, volunteer speakers/tourguides, and other partners evolved over time?
2. Survey other statewide historic preservation conferences, as well as similar Rhode Island preservation programs for the general public, in order to:
  - a. Identify areas of overlap as well as ways in which the Conference may address needs not being met by other programs
  - b. Identify best practices in terms of how other historic preservation conferences are structured, delivered, and funded.
3. Assess the value of the Conference program to the RIHPHC and to constituencies within the Rhode Island historic preservation community.
  - a. What does the RIHPHC hope to accomplish through the Conference, and is it successful? Is the Conference the best way to achieve these goals?
  - b. What does the RIHPHC gain from the Conference, and how has that changed over time?
  - c. How does the Conference relate to the RIHPHC's other programs? What does the Conference mean to the larger preservation community in Rhode Island? Whom does it reach and whom does it not reach?
  - d. What training (for instance, Historic District Commission member training, grant writing, historic house care) does the Rhode Island historic preservation community want? Is the conference the best platform for delivering training?
4. Develop practical recommendations that will lead to efficiencies in organization, budget, allocation of staff time, etc., for example:
  - a. What are best options for funding? And fiscal management?

- b. What are recommendations for programming?
- c. What are recommendations for staffing?
- d. What are recommendations for community involvement, for broader participation?

### **III. FUNDING**

This project is funded, in part, with Federal funds; compliance with all applicable Federal, State, and local laws, rules, and regulations is required.

### **IV. SCOPE OF SERVICES**

The selected consultant or consultant team will:

1. Gather and analyze data to include:
  - a. information about past Conferences (budget, attendance, partnerships, program content, staffing, and administration). Conduct interviews with past conference coordinators and RIHPHC staff.
  - b. information about funding resources (sponsorships, grants, registration fees, etc.) and current financial organization/management of the Conference.
  - c. information about other state historic preservation conferences (organized by statewide preservation organizations [“statewides”] and/or State Historic Preservation Offices [“SHPOs”]). Conduct interviews and further research on specific examples (New England states, others to be determined).
  - d. information about other similar Rhode Island preservation-related events (such as Newport Symposium, Providence Symposium, Rhode Island Land and Water Summit, etc.) and provide a general overview. Conduct interviews and further research on specific examples (to be determined).
  - e. input from stakeholders (RIHPHC staff and Commissioners, Executive Directors and Program staff at RI preservation organizations, local historic district commission members and staff, loyal conference-goers, and other groups to be determined) about recent Conferences and needs for future programs.
2. Convene regular progress meetings with RIHPHC staff 3-5 times over project period.
3. Compile the information gathered into a Part 1 narrative draft report with data tables, quotes from interviews, historical summary of the program, analysis of finances, etc. Edit Part 1 draft report upon receipt of comments from RIHPHC.

4. Develop a Part 2 narrative draft report with recommendations for future Conferences, to address both “big picture” questions (e.g., what are the RIHPHC’s goals for the Conference and how can those goals best be met?) as well as logistics, funding, program content, target audiences, and formats. Edit Part 2 draft report upon receipt of comments from RIHPHC.
5. Prepare final report (Parts 1 and 2).

All work by the Consultant will be carried out in close consultation with RIHPHC staff, and subject to RIHPHC approval.

## **V. WORK PRODUCTS**

Work products to be submitted to RIHPHC include:

1. Part 1 narrative draft report (data gathering/analysis)
2. Part 2 narrative draft report (recommendations)
3. Final report (Parts 1 and 2)
4. Additional data/information, as appendices to the report.

Any copyrights associated with work produced as part of this project will reside with the RIHPHC, PRI and the U.S. Department of the Interior, National Park Service.

## **VI. SCHEDULE**

### **Before or by:**

December 1, 2021:	Proposals due
January 3, 2022:	Consultant selected; candidates notified
January 21, 2022:	Contract executed
January - May, 2022:	3-5 regular project meetings with RIHPHC staff (schedule tbd)
May 27, 2022:	Draft work products (Parts 1 and 2) submitted to RIHPHC
June 24, 2022:	Comments by RIHPHC staff returned to consultant
July 29, 2022:	Final report and appendices due

Draft work products must be submitted to RIHPHC by May 27. All final work products must be completed by July 29.

## **VII. SUBMISSION REQUIREMENTS**

Proposals (pdf document) shall be submitted electronically to [Vtalmage@preserveri.org](mailto:Vtalmage@preserveri.org) no later than 4:00 PM on December 1, 2021. Proposals received after the deadline will not be accepted.

Responses to this RFP shall include the following information:

1. Title Page which should include the Request for Proposals subject, name of firm or lead consultant, address, telephone and fax numbers, email, contact person, and date of submission.
2. Names and titles of all staff assigned to the project, with project roles identified. Resumes as well as narrative descriptions of the background and experience of all staff assigned to the project, including lists of relevant projects and dates.
3. A description of the Consultant's proposed approach to the project, including any proposed changes or additions to the Scope of Services outlined in Section IV in order to better accomplish the goals of the project.
4. A work plan/schedule for completing individual tasks of the Scope of Services and submission of work products.
5. Lump Sum Project Fee, which must include all costs for carrying out the proposed work, including personnel, mileage, supplies, materials and all other necessary expenses.
6. A minimum of three (3) references related to projects with a scope of services similar to this project.

## **VIII. SELECTION PROCESS + CRITERIA**

RIHPHC will review and examine all proposals received. Those proposals that do not respond to the requirements of the RFP will be rejected. Responses will be evaluated on the basis of the relative merits of the proposal.

**The following criteria will be used to evaluate the responses to this RFP:**

1. Qualifications of the Consultant, especially in regard to work advising organizations. Experience with the development of conferences/public programs and familiarity with the historic preservation field is welcome but not required.
2. Narrative approach to the project.

3. Professional recommendations.
4. Ability to work effectively with State government.
5. Demonstrated ability to complete the project by July 29, 2021.
6. Fee.

## **IX. GENERAL CONDITIONS**

1. PRI and RIHPHC reserve the right to reject any and all proposals and to waive any informality.
2. The Consultant will abide by all Federal and State regulations in the performance of the Scope of Services specified in this Request for Proposals.
3. PRI and RIHPHC reserve the right to accept all or part of any proposal, and to negotiate a contract for services and cost with the selected Consultant.
4. The Consultant shall provide all necessary personnel, materials, equipment and facilities to perform and complete all work under this proposal.

## **X. CONTACTS**

Any questions regarding this RFP can be directed to Katherine Pomplun at [katherine.pomplun@preservation.ri.gov](mailto:katherine.pomplun@preservation.ri.gov) [funding source, proposal requirements, etc.] or Sarah Zurier at [sarah.zurier@preservation.ri.gov](mailto:sarah.zurier@preservation.ri.gov) [conference background, content].