

Franciscan Central Archive (FCA) Initiative

Request for Proposal For Archival Consultant

Issued by:

Franciscan Central Archive (FCA) Initiative

Working Group

FCArchive@franciscanway.org

October 2022

Introduction - Who We Are:

The Franciscan Central Archive (FCA) Initiative is lay staff and brothers and sisters of Franciscan congregations, many of which are facing financial pressures while also experiencing diminishment in membership. Among the issues faced is how to ensure the future care of the congregations' archival collections. Combined, these collections document Franciscan congregations from the mid-19th century to the present. The FCA Initiative is an attempt to ensure the future care of provincial and congregational archival collections.

The vision is, "A sustainable, charism-based collaborative repository for the combined archival collections of Franciscan congregations across the United States."

Project Description:

Summary of Requirements

Perform an assessment of the individual archival collections of our currently committed communities to determine archival conditions and needs at this time. Define the amount of space and types of storage systems needed for the collaborative repository and provide recommendations for the individual communities to prepare them for a future move.

It is expected that much of the work would be performed by email, phone, and Zoom. However, there will be necessary on-site work and all travel related to such work would be discussed with the FCA Initiative Working Group in advance.

Work is to begin January 1, 2023 and be completed by October 31, 2023.

Methodology and Deliverables

The consultant's work would start with a collection and preservation needs assessment followed by strategic planning:

Collection and Preservation Needs Assessment

- Review each community's CARA Questionnaire Survey and FCA (TOR Central Archive) Participant Survey (to be gathered and sent electronically). Communicate with each community for clarification.
- Gather information on individual community archival collection policies and procedures, record groups, inventories, finding aids, and current software used for the collections (i.e., MS Office, AtOm, etc.). This information will be gathered and sent electronically or via mail for review and discussion prior to each site visit.

- Visit each community to identify current archival conditions, needs, and concerns at each of the committed communities. This includes staffing, environmental concerns (mold or pest infestation), arrangement, description, rehousing, etc. (It is expected at least one day will be spent on site with archivist, followed on the next day by a meeting with leadership.)
- Identify the type and amount of digital storage each archive is currently using.
- Inform the FCA Initiative Working Group of the individual community needs.

Strategic Planning

- Provide recommendations for the individual communities to prepare them for a future move including processing plans for arrangement, description, housing, and preservation. Criteria for material housing and documentation will provide a minimum, better, best range to meet archival standards.
- Work with the FCA Initiative Working Group to review each individual community's operational infrastructure for the collections to define and provide goals for each community so that the future repository will operate with a shared collections management system.
- Determine the amount of space and types of storage systems (physical and digital) needed for the future collaborative repository using a space allocation matrix and recognizing potential later transfers or accruals.

Consultant Qualifications:

- Master's degree from an ALA accredited library and information science program with archives' emphasis. Minimum: History, preservation, or archives related bachelor's and master's degree with certification from the Academy of Certified Archivists (ACA).
- Minimum of 10 years relevant archival experience, preferably including in religious archives.
- Knowledge of collections management software.
- Current knowledge of digital challenges such as local versus cloud-based filing, retention, and preservation of born-digital and digitized documents.
- Experience in building relationships and working with internal and external stakeholders.
- Flexibility in interacting effectively in various interdepartmental settings.

Financial Proposal:

The contract will be undertaken on a flat fee basis, with an “all in” fee of \$55,000 paid in five installments. This is funded by a grant from the Academy of American Franciscan History (AAFH) with matching funds from the FCA Initiative committed communities.

Routine administrative and incidental expenses, including printing and copying and long-distance telephone charges, will not be reimbursed and will instead be absorbed within the contract fee.

If required, the FCA Initiative Working Group will be responsible for providing teleconferencing services. As well, any extraordinary expenses, such as mileage, meals and overnight accommodation that may be required will be in addition to the contract fee. Such expenses will not be incurred without the prior written approval of the FCA Working Group. For payment of travel expenses, the FCA Initiative would follow federal guidelines for meals and incidentals, as well as lodging upon submission of receipts. The IRS Standard mileage rates for vehicles and air fares will also be applied upon submission of receipts.

RFP Submittal and Closing Date:

- Proposal is to be clearly marked for “Archival Consultant RFP”, dated, and will be emailed with resume, three references, and cover letter to:

FCA Initiative Working Group

FCArchive@franciscanway.org

- Submissions should be no later than October 31, 2022.
- Late submittals will not be accepted.
- Submissions not in compliance with Submission Guidelines and Requirements, will be considered nonresponsive.

Inquiries and Addenda:

- For more information on the Franciscan Central Archive (FCA) Initiative, contact:

Holly Fiedler, MAC, SAA DAS

hollyf@franciscanway.org

Archivist, Sacred Heart Community

Sisters of St. Francis

303-458-6270 Ext. 112

- Consultants shall submit questions via email or phone no later than October 20, 2022.
- The FCA Initiative may require any clarification it needs to understand the consultant's proposal.

Submission Guidelines and Requirements:

- As indicated in the RFP Submittal and Closing Date, the proposal will be emailed with resume, three references, and cover letter, no later than October 31, 2022. Late submittals will not be accepted.
- Only qualified consultants with prior, similar project experience should submit proposals in response to this Request for Proposal.
- Consultants must list at least two projects that are substantially similar to this project as part of their response, including references for each. Examples of work are recommended.
- The consultant should provide a proposed schedule and milestones for completion of each phase of the project which addresses the points within the Project Description's Requirements, to include the Methodology and Deliverables: Collection and Preservation Needs Assessment and Strategic Planning.
- Should the consultant have a standard set of terms and conditions, these should be submitted with the proposal. All terms and conditions will be subject to negotiation.
- Proposals will remain valid for a period of 60 days.
- FCA Initiative Working Group anticipates selecting at least two consultants with whom to have more in-depth discussions and anticipates making an award to one of these "down-selected" consultants.
- Submissions must meet the Pass/Fail Criteria.

Proposal Evaluation and Consultant Selection:

Evaluation Process

Proposals submitted on time will be reviewed against Pass/Fail criteria. RFPs meeting those criteria will be forwarded to an evaluation committee for scoring against Evaluation Criteria and ranking. The outcome of the evaluations may, at the FCA Initiative Working Group’s sole discretion, result in (A) notice to a Proposer(s) of selection for tentative contract negotiation and possible award; or (B) further steps to gather more information for further evaluation. The selection process may be cancelled if the FCA Initiative determines it is in its best interest to do so.

Pass/Fail Criteria

- RFP Submittal and Closing Date criteria is met.
- Proposal is complete and addresses all Submission Guidelines and Requirements.

Evaluation Criteria

Evaluation factors and maximum points will be as follows:

Criteria	Maximum Score
Qualifications	25
Experience and Work Samples	30
References	25
Method of Approach	10
<u>Timeline and Milestones</u>	<u>10</u>
Total Maximum Score	100

The FCA Initiative Working Group reserves the right to award the contract to the best candidate for the FCA Initiative as determined solely by the FCA Initiative Working Group in its absolute discretion.

General Information; Terms and Conditions:

- The FCA Initiative Working Group may require any clarification or change it needs to understand the consultant’s project approach.
- The Consultant must indicate if they have insurance covering their work.
- The FCA Initiative Working Group reserves the right to reject any or all proposals and is not liable for any costs the Contractor incurs while preparing or presenting the proposal.
- The FCA Initiative Working Group reserves the right to cancel this RFP upon a good cause finding.

- The FCA Initiative Working Group may award a contract to the Contractor whose proposal, in the opinion of the FCA Working Group, would be most advantageous to the FCA Initiative.
- The selected Contractor will be required to assume responsibility for all services outlined in the RFP.
- This RFP does not commit the FCA Initiative Working Group to award a contract, nor to pay any costs incurred in preparation of the response to the RFP. The FCA Initiative Working Group reserves the right to accept or reject any or all responses received as a result of this request or to cancel this RFP in part or in its entirety. The FCA Initiative Working Group may request additional information from responders.
- Failure of the Contractor to perform the scope of work identified or to meet the performance standards established by the resulting contract may result in the following:
 - FCA Initiative's reduction or withholding of payment under the contract,
 - FCA Initiative's right to require the Contractor to perform, at the Contractor's expense, any additional work necessary to perform the scope of work or to meet the performance standards established by the resulting contract; and
 - FCA Initiative's rights, which FCA Initiative may assert, to declare a default of the resulting contract, to terminate the resulting contract, and to seek damages and other relief available under the resulting contract or applicable law.

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Request for Proposals for
Archival Consultant**

The Franciscan Central Archive (FCA) Initiative, lay staff and brothers and sisters of Franciscan congregations has the vision of a sustainable, charism-based collaborative repository for the combined archival collections of Franciscan congregations across the United States. We seek Requests for Proposals for an Archival Consultant to perform an assessment of the individual archival collections of our currently committed communities. The project is to determine archival conditions and needs at this time, to define the amount of space and types of storage systems needed for the collaborative repository, and to provide recommendations for the individual communities to prepare them for a future move. Funding is provided by a grant from the Academy of American Franciscan History (AAFH) with matching funds from the FCA Initiative's committed communities. Work is to begin January 1, 2023 and be completed by October 31, 2023.

Proposals will be considered based upon the consultant's qualifications, experience, work samples, references, method of approach, timeline, and milestones. Additional information, including a project description, scope of work, deliverables, funding description, submission requirements, and details on how the proposal evaluation criteria are weighted is included in the Request for Proposal.

Copies of the Request for Proposal may be obtained from the FCA Initiative by email at FCArchive@franciscanway.org or online at

<https://sacredheartprovince.franciscanway.org/archives/archival-consultant-rfp/>

Completed proposals will be accepted at the same email address no later than October 31, 2022.

Questions or concerns may be addressed to Holly Fiedler, Archivist, Sacred Heart Community, Sisters of St. Francis via email at hollyf@franciscanway.org or by calling 303-458-6270 Ext. 112.