

Connecticut Historical Society **museum**

REQUEST FOR QUALIFICATIONS

*The Connecticut Historical Society
seeks statements of qualifications for
an Exhibition Design Services Firm*

April 7, 2004

Deadline for responses: Monday, April 26, 2004, 4:00 PM EST

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Introduction

The CHS seeks design professional services for a 6,800 square foot permanent exhibition to be installed in an underground gallery at Hartford's Old State House (OSH), as well as for a related 1,800 square foot education center on the building's ground floor (for plans see Appendix I). The underground gallery (see images at Appendix II) is a rectangular space measuring 50 by 136 feet with 14 foot ceilings. It is accessed by both elevator and stairs in the center of one of the long sides of the rectangle. Offices and storage in the underground gallery will be removed to create more room for the exhibition. A total of \$X,XXX,XXX has been budgeted for the design, fabrication, and installation of the exhibition (\$X,XXX,XXX plus \$XXX,XXX allocated for contingencies) and an additional \$XXX,XXX for the design, equipment, and furnishings of the education center. The Education Center will open during the 2004/2005 school year; the exhibition is to open no later than 15 November 2005.

Separate A & E and construction contracts totaling \$XXX,XXX (\$XXX,XXX plus \$XXX,XXX for contingencies) will be let for the demolition of existing conditions in the underground gallery and for outfitting the space with proper electrical and mechanical service, lighting, and finishes. To complete the interpretation of the site, it is also anticipated that an audio tour of the historic portions of the building will be developed. The audio tour will also be the subject of a separate contract. A new retail space will be developed as well; it is also the subject of a separate contract.

To reiterate: this RFQ relates only to the design of the 6,800 square foot gallery and the 1,800 square foot education center, and does not include exhibit fabrication and installation services (which will be solicited in the spring of 2005 via a separate RFQ process).

PROJECT BACKGROUND

Old State House Administration. The OSH is currently owned by the City of Hartford. Until September 2003 the Old State House Association (OSHA) operated the OSH under the terms of a 101-year lease that terminates on December 31, 2096. In September 2003 the Connecticut Historical Society assumed management control of the OSH and the OSHA.

Brief History of Site. The OSH has undergone numerous transformations over the course of its long history. The site of the present OSH, overlooking the Connecticut River, has been known by a variety of names including Meeting House Yard, Court House Yard or Square, and State House Square. It is where Hartford's first meeting house was built in 1636. The largest structure in the community at the time, it was used for official government business as well as religious services. A succession of other buildings came and went including a school and a jail. A State, or Court, House was first erected there in 1720. It burnt later in the century and was eventually replaced by the present structure, which was completed in 1796. For more than two centuries the site was both the functional and symbolic heart of the local community and the colony/state. The colonial and state legislatures, town and, later, city governments, and the courts all sat there. Within the bounds of the site justice was meted out via corporal punishment and executions (including what may have been, in 1647, the first execution of an alleged witch in New England). Over many generations farmers brought their produce and livestock to market on the site. Auctions took place there too. So central was the site to the life of the community that milestones along the many roads that converged on the capital indicated the number of miles travelers would pass before reaching the Hartford Court House (today's OSH) – not Hartford.

Well into the early 19th century the OSH was amply suited for accommodating the simple needs of government. Ultimately, in 1828, local government (which had been based in the OSH since its completion in 1796) was obliged to move for want of space to a purpose-built City Hall. With the increasing complexity of state government, especially in the post Civil War period, a new and vastly larger state capitol was completed in 1879. With the departure of state government, city government returned to the OSH for 34 years before moving on to yet another new building in 1915. All of the structure's major interior spaces were altered at that time including its monumental House and Senate Chambers.

The city and the state had grown up around the OSH and its site. But following 1915, for the first time in its long history, the building and site no longer had a clearly defined functional purpose. Following the departure of City Hall in the early 20th century, the interior spaces were restored to their original appearance. However, given the paucity of available documentation the restoration was largely conjectural. Over the course of the succeeding decades the OSH was dedicated to a variety of uses until 1959 when it became a museum. Declared a National Historic Landmark in 1961, the Old State House Association (OSHA) assumed control of the OSH in 1976 and twenty years later

(in 1996) completed a \$12 million renovation of the site. At that time the decision was made to restore the Senate Chamber to its appearance in 1796 and the one-time House Chamber to its appearance in 1879, when it became Hartford's City Council Room. As part of the 1990s renovation, the exterior of the building was restored and new mechanical systems were installed. In addition, a 6,800 square foot gallery with museum-quality climate controls was constructed – underground so that the exterior appearance would not be altered – to house a core exhibition on Connecticut's history.

Following the completion of the 1996 restoration, the OSHA found itself without the staff, collection, and financial resources required to develop an exhibition for the new gallery. The highly desirable space was instead partitioned and used for offices and storage. Interpretation of the site, for both school groups and other visitors, was handled by costumed interpreters stationed in the upper portions of the building. To supplement the costumed interpreters' presentations, the OSHA occasionally mounted art exhibitions in what had been office spaces.

Interpretive Scope of the Permanent Exhibition. The themes for the 6,800 square foot permanent exhibition at the OSH have not yet been determined. The CHS staff is currently working with both researchers and academics to establish appropriate themes. Development of the interpretive scope will also be guided by audience research.

It is tentatively envisioned that the exhibition will enable visitors to explore the functional and symbolic roles that the current building and its site have played in Hartford and the State of Connecticut over a period of more than 365 years. Visitors might potentially be introduced to specific events of national importance that have taken place on the site – such as Thomas Hooker's sermon on the Fundamental Orders. Visitors might also learn that the history of the site more broadly reflects the ways in which national developments have manifested themselves on the local level. This is the site, for example, where 18th-century citizens celebrated the repeal of the Stamp Act and the end of the Revolutionary War. And it was here where the 19th-century execution of John Brown was protested. Drawing on these perspectives, it is anticipated that the proposed exhibition and related public programs will focus on the legislative, judicial, social, educational, religious, and economic institutions and activities that have flourished on the site of the OSH and in the present building. The meeting houses, school, government buildings, farmers' markets, auctions, rallies, and ceremonies that are all part of the story of this site have collectively contributed to the building of the local community, the state, the nation, and who we are as a people. In order to shed additional light on the evolution of American history, institutions, and culture, the exhibition will incorporate the experiences of people with diverse backgrounds and genders. The exhibition will also highlight historical aspects of the city in order to provide context to events that took place at the OSH.

Exhibition Format. Above all else, the visitor experience should be lively and fun. The moment visitors walk into the exhibition, their response should be "wow." It should make them feel as though they have entered an environment that is completely different

from the spaces they interact with and pass through on a daily basis, including the restored spaces in OSH itself. To the extent possible, a sense of drama and theatre should pervade the exhibition. The CHS is especially interested in making sure that the exhibition appeals to family audiences, and that it is as accessible as possible, both physically and intellectually, to visitors of diverse ages, educational backgrounds, and interests.

In recent years CHS exhibitions have included a wide range of artifacts and hands-on activities. The exhibitions have also used media presentations including object theaters and video. The CHS expects these and other innovative interpretive techniques to be considered for the OSH exhibition. CHS staff members have recently observed gallery-wide sound and light shows at the Imperial War Museum North in the UK and the Australian War Memorial that may serve as models for similar presentations at the OSH (examples can be seen at Appendix III). The CHS desires a low maintenance exhibition that sustains a high level of visitor involvement and interactivity. The museum staff is still determining whether to use a unidirectional floor plan (i.e., to encourage visitors to proceed along a predetermined route), or whether to use a more open-ended plan that encourages visitors to choose their own pathways.

Education Center. As noted below, a large proportion of the OSH's future visitors are expected to be school children, which will make them the site's largest and most important constituency. The CHS has identified a 1,800 square foot space on the north side of the OSH's ground floor as the setting for a new Education Center to serve school groups. This was previously the location of the OSH's gift shop, which was unprofitable and has been closed. While it is anticipated that school children will pursue activities throughout the new 6,800 square foot exhibition, as well as throughout the historic portions of the building, the Education Center will be a place where orientation may take place as well as activities that are either messy or that require use of tables. Children may also eat their lunches in the Education Center during inclement weather. The Education Center may also be used for family-oriented activities on weekends. The CHS envisions the environment of the Education Center will be extremely appealing to children, and that it will appear to be related design-wise to the permanent exhibition. The CHS tentatively plans to open the Education Center during the 2004/2005 school year in advance of the completion of the permanent exhibition.

Audience Projections. A study performed by ConsultEcon, Inc., projects a total audience in the range of 65,000 people per year. ConsultEcon also estimates that approximately two-thirds of the OSH's future visitors will be from within Connecticut and one-third from out of state. School groups are expected to represent 37% of overall visitation.

DESCRIPTION OF DESIGN PROFESSIONAL SERVICES TO BE PROVIDED

Scope of Work

The selected Vendor's contract will include, and extend through, the following phases of work, tasks, and anticipated deliverables:

1. Initial Concept Phase: CHS has initiated research to generate as much information as possible about the topic. A series of workshops will be held to begin to develop exhibit themes, ideas, and potential interactives. A mission statement, or "big idea" will be produced, as will supporting goals. The Vendor will participate in discussions with the CHS exhibition team as needed to flesh out the details of the exhibition's conceptual framework.

Deliverable: An approved initial concept document laying out exhibition content, conceptual framework, potential treatments, and the "big idea" and goals.

Outcome: *A brief, a creative outline plan that will inform the conceptual design development.*

2. Concept Phase: The exhibit team develops the final exhibit concept, and the exhibition's design and presentation approach is established. The Vendor will hold discussions with the CHS exhibition team as needed to finalize the exhibition's conceptual framework, design approach and presentation techniques. The Vendor will be expected to coordinate all Electrical/HVAC, etc. requirements with the selected architect throughout this phase.

Deliverable: An approved conceptual design and presentation plan for the exhibition. This may take the form of a narrative walkthrough of the exhibit space, and should include concept drawings, elevations, and an exhibition floor plan, and a written set of design parameters for exhibition-related needs and requirements such as (though not limited to) typography, colors, graphic formats and treatments, artifact display techniques, materials, furnishings, props and reproductions, audiovisuals, interactives, computer needs, language and readability levels, and adjustments to ensure physical accessibility.

Outcome: *Final approach of an innovative, creative, and cost- and time-effective design plan.*

3. Design Development Phase: The narrative of the conceptual design plan is fleshed out to fully develop the exhibition's design approach. The Vendor will prepare exhibition design drawings (e.g., floor plan, layouts, and elevations) and accompanying written instructions or specifications, and submit them to the CHS exhibition team for review; make changes and submit revised drawings and specifications in a timely manner for approval. The Vendor will be expected to coordinate all Electrical/HVAC, etc. requirements with the selected architect throughout this phase.

Deliverable: A build-ready construction bid package, including a complete set of exhibition drawings (floor plan, elevations, layouts, etc.) and comprehensive, detailed, written instructions and/or specifications for all exhibition-related elements and components, including (though not necessarily limited to) typography, graphic formats and treatments, color, structures (e.g., panels, cases), hardware (e.g., artifact brackets and mounts), furnishings (e.g., vitrines, decks), props, and reproductions, and shipping cases.

As required, exhibition drawings and detailed instructions and/or specifications for preparing bid packages to select sub-contractors to produce, develop, or procure audiovisual, interactive, computer, electrical, lighting, or other exhibition-related components or services.

Outcome: Prepare a complete, comprehensive, and construction-ready set of design drawings and specifications for the exhibition's fabrication and installation.

4. Fabrication and Installation Phase: Oversee, with CHS, the on-time and on-budget execution of the approved design up to and through the fabrication and installation of the exhibition by the fabrication vendor (to be selected by the CHS using a separate RFQ process). Assist the CHS exhibition team and/or fabricator in identifying, preparing bid packages and accompanying specifications for, and selecting appropriate sub-contractors whose services may be needed to complete the exhibit (e.g., audiovisuals, interactives, digital media, lighting, etc). Work with the CHS project coordinator, to provide expert consultation and assistance to the exhibition fabricator and/or sub-contractors, offering creative, time- and cost-effective solutions for any design-related questions, problems, needs, or other issues that may arise.

Deliverable: Oversee, with CHS, the on-time and on-budget execution of the approved design up to and through the fabrication and installation of the exhibition by the fabrication vendor.

Outcome: Ensure that the exhibition is successfully fabricated and installed in the OSH Gallery on time and within budget.

5. Post-Opening Phase: Consult on any design-related needs that might arise. Respond in a timely manner to correct any design-related problems, needs, or issues that arise after the exhibition opening. Solutions should be creative, and time- and cost-effective.

Deliverable: A manual that provides detailed information and instructions on the exhibition's operations and maintenance.

Outcome: A smoothly operating exhibit.

Project Management

The CHS looks to the design firm to inform the needs of the project and maintain a cohesive design effort. Therefore, the Vendor must establish a work plan (work breakdown structure) and schedule for all parties to ensure timely completion of the project. Meet regularly with the CHS exhibition team to report on and track the design process, and establish and implement mechanisms for ongoing communications during the intervals between such meetings. The Vendor must establish one person to serve as project manager and liaison to the CHS project coordinator.

What the Connecticut Historical Society Staff will Provide

The CHS museum will be intimately involved in the content and exhibit development of the OSH exhibit and education center. The CHS staff has a track record of developing complex interactive exhibitions, on time and on budget, for not for profit museums and exhibit design firms. The core CHS team for the OSH exhibition will include the CHS Executive Director, the Deputy Director for Interpretation, the Lead Exhibit Developer and an additional Exhibit Developer, the Project Manager, and part-time researchers. These CHS staff will conduct research, develop concept themes and interactives, write exhibit label copy, and coordinate the work between the CHS and the Vendor. In addition, the CHS and the Connecticut State Library will provide artifacts for the exhibition and will work with the Vendor to ensure proper handling and conservation of these artifacts.

Unusual Conditions and Requirements

- Selection of an architect to design and oversee renovation of the OSH gallery is concurrently underway. It is necessary that the architect and the exhibition designer will work together in a collaborative manner.
- Additional funding over and above the \$X,XXX,XXX currently budgeted for exhibition design, installation, and fabrication may become available between now and the awarding of a contract for exhibition construction. During the exhibition design process, the designer should make suggestions for additional or alternate exhibit elements that would enhance the visitor experience but that cannot be accommodated within the scope of the current budget.
- All firms selected for this project will be contracted through a qualifications-based competitive process managed by CHS.

Funding Program Requirements

Please see attached State of Connecticut “Submission Guidelines for Owners and Architects.”

Time Schedule

The OSH Education Center is tentatively expected to open on during the 2004/2005 school year. The exhibition is to open on or before November 15, 2005. See draft schedule (attached) for additional detail.

Selection Process

This is a two-step process. Written Statements of Qualifications will be due by 4:00 PM on Monday, April 26, 2004. A Selection Committee will review the submittals and select a short list of firms for participation in the second step. A letter will notify all submitting firms of those firms selected for participation in the second step. Short listed firms will be asked to submit a fee proposal.

Following the review of the fee proposals by the Selection Committee, the Committee will schedule interviews with each of the short listed firms. Selection of the design consultant will then take place following the interviews.

Schedule for Selection Process

The following is the anticipated Selection Process Schedule.

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| • Request for Qualifications issued | April 7 |
| • Questions/queries to CHS by | April 19 |
| • Statements of Qualification due | April 26 |
| • Selection Committee review of Statements of Qualification and selection of finalists completed | April 30 |
| • Short-listed firms notified and requested to submit Fee Proposals | April 30 |
| • Fee Proposals Due | May 7 |
| • Interviews take place week of | May 10 |
| • Exhibition design consultant selected on or before | May 17 |

Statement of Qualifications Requirements

The Statement of Qualifications must include the following elements:

- 1) Letter of interest.
- 2) Demonstration and recognition of accomplished exhibit design.
- 3) Experience of the firm/team as designer of exhibits of similar scale, complexity, and budget, emphasizing firm's record of meeting estimated budgets and schedules.
- 4) Identification and resumes of personnel to be directly involved in this project: principal, project designer, others expected to perform work, including those in affiliation. A collaborative team approach covering all aspects of exhibit design is encouraged.
- 5) Identify current workload of firm and personnel to be assigned to project.
- 6) Experience of the proposed personnel with similar facilities.
- 7) Experience in working together in a collaborative effort with facility design and construction teams.

- 8) Experience in working with client exhibit developers and collection teams for integrated exhibit design.
- 9) Experience in designing exhibits which meet the Americans with Disabilities Act requirements.
- 10) Identification of firm's experience with the public design process and Minority or Women Owned Business requirements. (This project is receiving funding from a governmental source.)
- 11) Description of the firm's design and project management philosophy.
- 12) Describe your innovative design solutions to similar spaces.
- 13) Describe how you provide electric load requirements to an architect.
- 14) Describe how you design for low cost and to budget. Provide examples.
- 15) Describe your approach to modular design, while maintaining continuity and consistency to the overall theme.
- 16) Identify your in-house design capabilities and those services that you would outsource.
- 17) Demonstrate experience in coordinating exhibits with long term management plans, including the integration of warranties, operations and maintenance manuals.
- 18) Distinguish between experience in presenting artifacts versus experience in developing interactive and/or technologically sophisticated displays.
- 19) References from at least three similar projects, to include: key owner personnel and contractors project manager.
- 20) Completed GSA Forms 254 and 255.

The statement of qualifications may not exceed **20** 8.5 by 11 –inch single-spaced pages in length. Note that the completed GSA Forms 254 and 255 do not count toward this total.

By submitting a Statement of Qualifications, the respondent firm authorizes the CHS to contact any or all of those firms or individuals listed as references or contacts of the information provided.

Hourly Rate and Expense Schedule

Please submit an hourly rate and expense schedule.

Questions and Inquiries

Questions and inquiries, in written form via email, will be accepted from any and all firms. Questions will be answered in writing via email and will be distributed to all firms who receive the RFQ provided that all questions are received by **April 19, 2003**.

For project-related questions or specific questions regarding this RFQ, please contact:

James Jensen
Lead Exhibit Developer
The Connecticut Historical Society
E-mail: james_jensen@chs.org

Addendum and Supplement to RFQ

If it becomes necessary to revise any part of this RFQ or if additional data are necessary to enable an exact interpretation of provisions of this request, an addendum will be issued. It is the responsibility of the Vendor to ensure that it has received all addendums prior to submitting a proposal.

Criteria for Selection

The following criteria will be used for screening and selection of the exhibit design team:

- 1) Established record of design excellence for museum facilities.
- 2) Insight into the relationship between the design and programmatic success of a museum.
- 3) Experience in designing projects of a similar scale and complexity.
- 4) Experience in working in a collaborative environment.
- 5) Experience in designing exhibits that are highly interactive and provide experiences with a broad appeal.
- 6) Amount of proposed interaction with CHS and other stakeholders.
- 7) Experience with the public design process and Minority or Women Owned Business requirements.
- 8) Experience and availability of key individuals proposed for the project.
- 9) Reputation for thoroughness, credibility, and client responsiveness as demonstrated through references.
- 10) Insight and creativity regarding the CHS desire to be innovative.

Location and Address to Which Responses Should be Submitted

A total of 10 copies of the Statement of Qualifications should be submitted to the CHS at the following address:

The Connecticut Historical Society
OSH Exhibition Design RFQ
1 Elizabeth Street
Hartford, CT 06105

Date/Time for Receipt of Responses

Written Statements of Qualifications will be due by 4:00 PM on April 26, 2004.

Contractual Status of RFQ and Proposals

The RFQ is not binding on the CHS. Furthermore, the CHS assumes no responsibility for the costs incurred in the preparation of a Statement of Qualifications or Proposal or related activities of any Respondent.

The CHS reserves the right to withdraw the RFQ at any time in its sole discretion before the execution of the contract.

The CHS reserves the right not to proceed with any of the Respondents to the proposal. In such event, the CHS shall not be liable to any Respondent for additional costs incurred by it as a result of the withdrawal of the RFQ or by the failure to proceed with any Respondent.

The RFQ has been prepared solely to solicit Proposals, and is not a contract offer. The only document that will be binding on the CHS is the contract duly executed by the CHS and the successful applicant after the completion of the selection process and the award and negotiation of the contract.

Proprietary Information and Confidentiality

All respondents' responses will be treated as proprietary information and will be used solely for the purposes herein. Should a Respondent require its response to be returned the CHS will do so at the Respondent's request and at the Respondent's expense.

Copyright Ownership of Vendor's Work Product

The selected Vendor's services will be engaged and shall be rendered on a work-for-hire basis in favor of CHS for copyright purposes. In the event such services are not deemed to be on a "work made for hire" basis, then the Vendor shall assign to CHS the Vendor's entire rights, title and interest, including copyright, in and to anything created or developed by the Vendor for CHS under any agreement concluded by Vendor and CHS, including (by way of example and not of limitation) all original files or work files created by or in the possession or control of the selected Vendor, and all patents, copyrights, trade secrets and other proprietary rights in the work performed by the Vendor for CHS. The Vendor shall cause any sub-contractor or partner to do the same.