



**Online Marketing Support  
REQUEST FOR QUOTES  
July 13, 2022**

This Request for Quote (RFQ) is issued by the Constituent Engagement team in the Smithsonian Institution (SI) Office of Advancement, for technical professional, non-personal services to provide strategic, technical and project management services related to online marketing in accordance with the Statement of Work (SOW).

**I. SUBMITTING YOUR QUOTE**

Price quotes may be submitted by email to Lara Koch at [kochl@si.edu](mailto:kochl@si.edu). Quotes are due by 5pm ET, on Friday, July 29, 2022.

**II. DESCRIPTION OF REQUIRED SERVICES**

The Smithsonian has a requirement for professional, strategic, production and project management support services to support and assist with online marketing efforts for the Director of Online Engagement and Fundraising in the Office of Advancement between October 1, 2022 and September 30, 2023, not to exceed 30 hours per week. The quote should be firm fixed total cost based on hourly rate and total number of hours during the period of performance for a base year and two subsequent option years. The Statement of Work is included in attachment 1.

**III. EVALUATION**

The SI plans to award based on best value to the SI considering the following factors' here. The SI plans to award without discussions, however, does reserve the right to conduct discussions if later determined by the Contracting Officer to be necessary.

All of the following factors are of equal importance. Evaluation factors are:

**A. Relevant Experience/Past Performance**

1. The contractor will demonstrate experience with digital marketing strategy and best practices for nonprofit organizations. Include three projects within the past four (4) years with brief description, time frame, and services provided that demonstrate capability to perform the work required in this RFQ.
2. Past Performance should be indicated by a list of current or previous contracts with names of points of contact and their current telephone numbers or email addresses who can answer specific questions on quality, workmanship and scheduling.

**B. Qualifications/Technical Competence****1. Technical Information**

- a. To satisfy the requirements of the SOW, Contractor should have experience with the Blackbaud “Convio” Luminare Online digital marketing platform, particularly the Email, Donation, PageBuilder, Survey and Constituent360 modules; Atlassian products JIRA and Confluence; Drupal, Google Analytics, and GoogleAds; working directly within web markup languages HTML5 and CSS3; strong understanding of web, email, social media and digital advertising metrics and analytics and understanding of current web and email design, UX, UI and Accessibility best practices.

**D. Price**

The quote should be firm fixed total cost based on hourly rate and total number of hours available, not to exceed 30 hours per week, during the period of performance. In addition to a price quote for the first year, please also submit pricing as a firm fixed cost and hourly rate for up to two (2) option years for a total of three (3) years of pricing. The price evaluation will cover pricing submitted for all years. The amount budgeted for the first year of this project is \$85,000.

**IV. INSURANCE REQUIREMENTS**

Prospective contractors are required to have Commercial General Liability Insurance. If you are the selected contractor and you do not have insurance and you do not wish to take out your own policy, you may elect to join the Smithsonian Institution’s Commercial General Liability Policy for Contractors. The premium charged varies with the dollar amount of the contract. The SI must be listed as additional insured for the General Liability insurance. Proof of insurance must be submitted with quotes.

**V. SYSTEM FOR AWARD MANAGEMENT (SAM) REGISTRATION**

It is a requirement that current and prospective recipients of contracts and purchase orders awarded by the SI must complete registration in SAM and maintain an active record in SAM throughout the period the SI award is in effect. The SAM requires a one-time business registration, with annual updates, and allows vendors to control the accuracy of the business information they enter. The financial data you enter, which includes the electronic funds transfer (EFT) data collected by SAM, will assist the SI with correctly directing payments on your invoices and complying with the Federal Debt Collection Improvement Act of 1996.

Within thirty (30) calendar days after your SAM registration is activated you must mail a notarized letter to SAM. You will receive guidance on this procedure throughout the SAM registration process and again after your SAM registration is activated. Federal agencies, including SI, has been assured that once an entity's SAM registration is activated, agencies may engage that entity. Notarized letters from registered entities will need to contain specific language. OCon&PPM has provided the preferred language for letters with our form memo OCon 120 – Mandatory Registration in the System for Award Management (SAM) that accompanies this RFQ.

If yours is the acceptable price quote and you are selected for award, your organization's active registration with SAM must be verifiable by SI staff managing this procurement prior to contract or purchase order award being executed, and at the time any modifications or amendments to awards might be required.

You may complete or update your SAM registration information anytime online at <http://sam.gov>. Questions regarding the process may be directed to the Federal Service Desk online at [www.fsd.gov](http://www.fsd.gov) or via toll free call to 1-888-606-8220. There is no charge for registering in SAM.

## **VI. UNIQUE ENTITY IDENTIFIER (UEI) NUMBER**

A UEI number is a unique twelve-digit alpha-numeric identifier that will be assigned to you when your SAM registration is completed. A UEI is available for each physical location of your business (see Section V. of this RFQ). You will need to maintain your assigned UEI(s) in a safe location where they may be easily accessed. Your UEI will be required whenever you need to annually update your SAM registration or make changes to your SAM registration information at any time.

## **VII. LEGISLATIVE AND/OR ADMINISTRATIVE REQUIREMENTS**

### **A. Service Contract Act of 1965, as amended**

If services to be performed are covered by the Service Contract Act (SCA), as amended, the SCA shall apply to all work performed under the contract, purchase order, or GSA schedule task order to be issued. Individuals and companies submitting quotes are encouraged to verify the wages and fringe benefits determined by the U.S. Department of Labor to be payable for the Labor Category and in within the location that work performance will occur as cited in the Statement of Work. The SCA wages and fringe benefits payable shall be part of the order award.

Individuals and companies awarded a contract, purchase order or GSA schedule contract task order for SCA covered services are responsible, and required by law, to

deliver to its employee(s) or post a notice of the required compensation in a prominent place at the worksite. The SCA provides authority to contracting agencies to withhold contract funds to reimburse underpaid employees, terminate the contract, hold the contractor liable for associated costs to the government, and debar from future government contracts for a period of three (3) years any persons or firms who have violated the SCA. The contracting officer awarding this order, or the Smithsonian Inspector General, may periodically require contractors to provide information that verifies compliance with the SCA for services provided under the awarded contracts, purchase orders or GSA schedule contract task orders.

## **B. E-Verify**

If at award, or anytime during contract performance, the dollar amount of the contract award exceeds \$150,000 or \$5,000,000 under GSA Schedule, with a period of performance over 120 days, the successful bidder is required to register in the E-Verify System and verify that all individuals to be hired under the contract award are eligible for employment within the U.S. This requirement is not applicable to work that will be performed outside the U.S. or for Commercial Off the Shelf (COTS) items.

E-Verify is an Internet-based system operated by the Department of Homeland Security (DHS), U.S. Citizenship and Immigration Services (USCIS). It allows employers to verify the employment eligibility of their employees, regardless of citizenship. For more information on e-verify and when, why and how to register and use the system please go to the USCIS site on the World Wide Web at:

[E-Verify.gov](https://e-verify.gov).

*Executive Order 13465 and Homeland Security Policy Directive 12 (HSPD-12)*

## **C. Background Investigations**

If a contractor employee assigned to the SI under this contract will have an association with SI that will be greater than thirty (30) days, determined either at time of contract award or anytime during contract performance, and will need access to staff-only areas of SI controlled facilities and leased spaces, the employee shall be required to receive an SI Credential. Contractor employees who require an SI Credential shall be required to undergo and pass an appropriate background investigation and complete security awareness training before an SI Credential is issued. Employees whose associations with the SI will be less than 30 days shall not receive a background investigation or SI Credential, however, they must be escorted by Credentialed personnel at all times when in staff-only areas of SI facilities. If relevant to this RFQ, a

form OCon 520, Background Investigations and Credentials for Contractors' Personnel, is included. The following actions shall be required to be completed by the SI Contracting Officer's Technical Representative (COTR) and successful vendor:

1. The COTR shall provide an OF-306, Declaration for Federal Employment form, for each of the Contractor's employees who will be assigned to the SI for 30 days or longer. The OF-306 forms must be completed by each person and returned by the Contractor to the COTR, or other designated SI employee, within ten (10) workdays from receipt of the forms by the Contractor.
2. For contractors to SI organizations outside the Washington DC and New York City areas, forms SF-87, Fingerprint Cards, shall be provided to the Contractor by the COTR or other designated SI employee. Each form SF-87 must be returned to the COTR, or other designated SI employee, within ten (10) workdays from receipt of the forms by the Contractor. When necessary, the forms SF-87 shall be submitted by the Contractor with the OF-306.

*Homeland Security Policy Directive 12 (HSPD-12)*

#### **VIII. INFORMATION TO BE SUBMITTED WITH QUOTES**

Quotes submitted must include the following information to be deemed responsive to this Request for Quote and accepted by the SI:

- A.** Project Title
- B.** Business name, address, telephone number, and UEI number
- C.** Business point of contact name, telephone number and email address
- D.** Pricing. Ensure that base year and option year pricing is included.
- E.** Past Performance information should include the contract number, contact person with telephone number and other relevant information for at least 3 recent relevant contracts for the same or similar goods and/or services.
- F.** Certificates or other documentation confirming appropriate types and levels of insurance required are in effect, and other certificates and documentation requested.
- G.** If services are subject to the requirements of the Service Contract Act provide with your quote:
  1. U.S. Department of Labor wage determination hourly rate payable within the location of work performance
  2. Health and Welfare hourly rate payable within the location of work performance
  3. IFF hourly rate payable within the location of work performance
  4. G & A hourly rate payable (e.g., markup, overhead, etc.) within the location of work performance

5. Vacation hourly rate payable within the location of work performance
6. Holiday hourly rate payable within the location of work performance

- H.** If requested in the RFQ, provide résumés of personnel that may be assigned to perform work under the anticipated award.
- I.** When prices quoted are in accordance with the terms of a General Services Administration (GSA) schedule contract, provide the following information: your GSA contract number, SIN, goods and/or services pricing.
- J.** Indicate any discounts to your GSA schedule contract pricing that is being extended to the SI by your price quote(s).
- K.** Cite the date through which pricing submitted is valid.

**ATTACHMENT(S):**

- Statement of Work for Online Marketing Support, July 13, 2022
- Form SI 147A, Smithsonian Institution Purchase Order Terms and Conditions
- Form SI 147B, Smithsonian Institution Privacy and Security Clause
- OCon 120, Mandatory Registration in the System for Award Management (SAM)

**ATTACHMENT 1**  
**Online Marketing Support**  
*STATEMENT OF WORK*  
**July 13, 2022**

## **INTRODUCTION**

The Online Fundraising and Engagement team, part of the Office of Advancement of the Smithsonian Institution, is responsible for raising unrestricted online funds on behalf of the Friends of the Smithsonian membership program, as well as assisting Smithsonian museums, programs, and centers with their mass marketing digital marketing and fundraising strategy. The in-house team oversees the central Smithsonian email list, as well as online marketing activity across other owned and earned online marketing channels.

## **SCOPE OF WORK**

The Smithsonian has a requirement for professional, strategic, production and project management support services to support and assist with online marketing efforts for the Director of Online Engagement and Fundraising in the Office of Advancement between October 1, 2022 and September 30, 2023, not to exceed 30 hours per week. The quote should be firm fixed total cost based on hourly rate and total number of hours during the period of performance for a base year and two subsequent option years.

## **SPECIFIC TASKS**

In coordination with the COTR and Office of Advancement, contractor shall provide the following services/tasks:

- Serve as lead project manager for all Online Engagement and Fundraising projects, including all major marketing campaigns:
  - #GivingTuesday and Calendar Year End (November 2022 – January 2023)
  - Spring Member Drive (March 2023 – April 2023)
  - Membership Flash Drive (June 2023 – July 2023)
  - Smithsonian Birthday (August 2023)
  - Fall Member Drive (September 2023)
- Assist with production of online marketing efforts and campaigns, including sourcing content ideas and assets, writing copy and producing emails, surveys and web pages, and developing, QAing and launching emails using the Blackbaud “Convio” Luminare Online platform
- Produce email event invitations for the Friends of the Smithsonian membership program and other Office of Advancement events as required

- Serve as main point of contact for the Office of Advancement's JIRA and Confluence platforms, including maintaining and building out existing schema, providing regular trainings, and onboarding existing and new OA staff onto the platform
- Make updates to the Smithsonian Advancement website as assigned
- Assist in launching, managing and reporting on digital advertising efforts for the GoogleAds platform.
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## **DELIVERABLES**

The contractor shall provide the following deliverables:

- Lead project management for all Online Engagement and Fundraising Campaigns, to include campaign planning, task and issue tracking, asset production and quality assurance for emails, graphics and web engagement opportunities for all major Online Engagement and Fundraising campaigns:
  - Host campaign planning kickoff meeting minimum 3 months before campaign launch
  - Use Atlassian JIRA to create, assign and oversee all campaign tasks to completion minimum 2 months before campaign launch
  - Create campaign infrastructure inside Blackbaud “Convio” Luminate Online minimum 2 months before campaign launch
  - Lead quality assurance for all assets, ensuring that all emails are ready for launch a minimum of 2 business days before launch and are launched successfully
  - Pull metrics for all campaign activities, create visual and narrative summaries, and host campaign debrief meetings no later than one month after last campaign effort
    - Fall Member Drive (due first Monday of November, 2022)
    - #GivingTuesday and Calendar Year-End (due first Monday of February, 2023)
    - Spring Member Drive (Due first Monday of May, 2023)
    - Flash Drive (Due first Monday of August, 2023)
    - Birthday Campaign (Due third Monday of September, 2023)
- Host weekly project check in for the Online Engagement and Fundraising team
  - Produce email invitation series for Friends of the Smithsonian and Office of Advancement
  - Turn initial request into JIRA task infrastructure including tasks for each individual email
  - Liaise with team hosting event for all required text, assets and list data
  - Have emails ready for review at least four (4) business days before launch and liaise with event teams for final approval
  - Schedule and ensure all emails have launched
- Lead efforts in legacy documentation using the Atlassian Confluence platform



- Identify gaps and needs in existing documentation and report findings to OEF Director by second Monday in January, 2023, including a plan for creating documentation, sorted by priority, complexity and urgency
- Source content for inclusion in emails, including eNews and engagement emails
  - Content ideas for eNews due the second Monday of each month

## **SPECIFICATIONS**

- All project management and individual task performance shall be performed within the Atlassian JIRA issue tracking tool; task acknowledgement, specifications, associated assets, discussion and deliverables should exist within the JIRA platform and task must be completed by the associated due date
- All online marketing activities for the Friends of Smithsonian email list will happen within the Blackbaud “Convio” Luminare Online digital marketing platform