

**STATEMENT OF WORK
PENNSYLVANIA HISTORICAL AND MUSEUM COMMISSION (PHMC)
MUSEUM EXHIBIT AND PRESERVATION SERVICES
INVITATION TO QUALIFY (ITQ) CONTRACT**

OVERVIEW: The purpose of the PHMC Museum Exhibit and Preservation Services ITQ is to qualify responsible and responsive Contractors for the purpose of providing museum exhibit planning, design, fabrication and installation services and preservation services on behalf of the Pennsylvania Historical and Museum Commission (PHMC).

NO OTHER COMMONWEALTH AGENCY MAY USE THIS ITQ WITHOUT PRIOR, WRITTEN APPROVAL BY PHMC. APPROVAL WILL BE ON A CASE-BY-CASE BASIS. ALL QUESTIONS AND COMMENTS SHOULD BE DIRECTED TO THE ISSUING OFFICER LISTED BELOW.

- A. EXHIBIT SERVICES:** Involves rehabilitating or replacing old and outdated exhibits or producing new exhibits. The definition of exhibits shall be defined as including, but not be limited to, any one of the following or combination thereof: display cases; exhibit panels; platforms; information desks; cabinets for visitor- activated video and audio programs; glass or Plexiglass barriers; graphics; photographs; photo murals; models; dioramas; artifact mounts; conservation surveys and treatments of artifacts to be included in exhibits; interior and exterior signage; development of materials for web or mobile applications; audio/visual programs; immersives; digital interactive experiences (including database creation, coding or programming, content collection and preparation, and other elements of the design); and all planning documents. Principal spaces containing exhibits may include lobbies; assembly spaces; galleries; hallways and exhibit halls or rooms. Work may involve travel to the site/museum to meet with site staff, inspection of the museum, assessing rehabilitation of existing resources and/or scope of work for new design, preparing cost estimates for the work, providing measurements and drawings, and fabrication and installation of exhibits and may also include various types of museum planning.
- B. PRESERVATION SERVICES:** Involves a variety of preservation services including, but not limited to, historical site preservation planning, historical research, archaeological research and investigations/excavations, landscape preservation, preservation and maintenance of historic buildings, structures, museums and support facilities, maritime preservation, historic building investigation and analysis, materials diagnostic testing and analysis, building investigation removal and restoration, specialized preservation trades/craft work, training and other consultant services at various historic sites, museums and other facilities owned by the Commonwealth and administered by PHMC.

Potential Contractors may visit the PHMC's website at: www.patrailsofhistory.com to view a list of possible sites throughout the Commonwealth of Pennsylvania (Commonwealth) where work may be performed under any resulting project.

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ISSUING OFFICE: This ITQ is managed and administered by the Commonwealth of Pennsylvania, Department of General Services (DGS), Bureau of Procurement. All inquiries should be referred to:

Lisa A. Burchfield, Chief, Fiscal & Office Support Services
PA Historical & Museum Commission
State Museum of PA
300 North street, 5th Floor
Harrisburg, PA 17120
Telephone: (717) 705-0557 Facsimile: (717) 783-2807
Email: liburchfie@pa.gov

QUALIFICATIONS: Contractors interested in becoming an ITQ Contractor must meet the following requirement. Failure to meet the below requirement will result in the application being rejected. Each Contractor that meets the minimum qualifications will be awarded a contract. Award of a contract to a Contractor is not a guarantee of business.

A. Exhibit Planning and Design Services

General Criteria for Eligibility:

Organizations that perform Exhibit Planning or Exhibit Design services for their own museum or as part of a larger cultural institution are not eligible for this Commodity Code.

Contractors must provide documentation supporting the following eligibility qualifications:

1. A statement outlining the type and quality of projects completed, with examples provided. For those examples, applicants should include a project description with scope of work performed, photographs or similar examples of completed work, year completed, and client.
2. The number of years in business, including two (2) years of experience in the appropriate Commodity Code selected under Service Categories.
3. Staff resumes and in-house services provided.
4. A list of 3 references from clients worked with.

B. Exhibit Fabrication and Installation Services:

General Criteria for Eligibility:

Organizations that perform exhibit fabrication, or installation as a component of work for their own museum or as part of a larger cultural institution are not eligible for this Commodity Code.

Contractors must provide documentation supporting the following eligibility qualifications:

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1. A statement outlining the type and quality of projects completed, with examples provided. For those examples, applicants should include a project description with scope of work performed, photographs of completed work, year completed, square footage, and client.
2. The number of years in business, including two (2) years of experience in the appropriate Commodity Code selected under Service Categories.
3. The volume (in dollar \$ amount) of relevant work per calendar year for the last three (3) years.
4. A list of in-house capabilities for fabrication and installation. Any other in-house capabilities (e.g. design, lighting, av) should also be noted.
5. Staff resumes and in house services provided.
6. A list of 3 references from clients worked with.

C. Preservation Services:

General Criteria for Eligibility:

Contractors must provide documentation supporting the following eligibility qualifications:

1. A description of your business and statement outlining the specific preservation services you can provide.
2. A minimum of three examples of projects in each service category that you have completed in the last 10-years. Include a project description with scope or work performed, year completed, and contact information for references.
3. The number of years in business, including two (2) years of experience in the appropriate Commodity Code selected under Service Categories.
4. The volume (in dollar \$ amount) of relevant work per calendar year for the last three years.
5. Resumes and qualifications of the primary staff that will be assigned to the work under this contract.

SERVICE CATEGORIES: Contractors will choose the appropriate commodity code(s) to qualify for this contract. Contractors will select the appropriate code(s) under the Business Details section of the qualification process. The Commonwealth may add additional commodity codes as the need arises. The table below lists the appropriate commodity code and description of each service category.

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COMMODITY CODE	DESCRIPTION OF SERVICE CATEGORY
93140000-ITQ-125 Project Manager – Exhibit Planning and/or Design Services	<p>Prime Contractors shall assemble a team of professionals (Prime Contractor and/or Subcontractors) to provide museum Exhibit Planning and Design Services. Overall project management shall include scheduling, coordination, and managing all aspects of work produced in close conjunction with the PHMC Project Manager and Museum/Site Administrators. Contractors qualifying under this category shall also be responsible for the coordination and completion of the below subcategories for any awarded projects:</p> <p><u>Planning:</u> Provide Planning Services for existing and/or new exhibits, or for other museum functions that may include the following: Exhibit Planning and Development; Strategic Planning; Interpretive Planning; or other types of Plans required.</p> <p><u>Research/Writing/Editing:</u> Perform research in various fields of history, fine arts and natural history in order to supplement PHMC staff research and assist in object/graphics selection to illustrate stories. Research may include both primary and secondary sources. Script Writing and/or Editing may be needed during the design process and to finalize label copy for exhibits (subject to PHMC review and approval).</p> <p><u>Design Services:</u> Provide Design Services for existing and/or new exhibits.</p> <p><u>Exhibit Design During Design Phase of a Project</u> – May include any or all of the following: developing overall conceptual design, designing all elements of an exhibit, conducting evaluations during any phase of the project, modular design of standard components, artifact mounts, the use of microclimates (such as specially designed</p>

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cases or HVAC equipment), and specialized artifact security. Furthermore, Exhibit Design Services During Design Phase of a Project may include the following:

- Lighting Design
- Building Interior and Environmental Design
- Fixture/Furniture Design
- Audio/Visual and Interactive Components - PHMC reserves the right to utilize the Bureau of Commonwealth Media Services (CMS) within the Department of General Services to produce audio/visual programs in-house; the Contractors involvement could be limited to script development and/or creative story boarding on any or all projects assigned in this category.
- Signage – Provide a coordinated graphic design and installation system for signs, labels and other print descriptions. The PHMC may provide standard elements for some signs. Signage may include site entrance signs, other outdoor directional and informational signs, site interpretive signs, indoor directional and informational signs and indoor interpretive signs. All signs shall conform to standards adopted in the industry for compliance with the intent of the Americans with Disabilities Act.

Exhibit design must conform to the following guidelines when necessary:

1. The Americans with Disabilities Act Accessibility Guidelines (ADAAG).
<https://www.access-board.gov/guidelines-and-standards/buildings-and-sites/about-the-ada-standards/background/adaag>
2. Smithsonian Guidelines for Accessible Exhibition Design_
<http://accessible.si.edu/pdf/Smithsonian%20Guidelines%20for%20accessible%20design.pdf>.

Exhibit Design During Fabrication/Installation Phase of a Project – Coordinate all final design work and provide technical support during the Fabrication and Installation phase of a project. More specifically, work may include:

- Production Ready Graphic Exhibit Material – Prepare computer-generated material that is ready for output by others and includes high-resolution scans of graphic material, final text, colors and graphic treatments.

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	<ul style="list-style-type: none"> • Revision of Exhibit and Case Layouts – Revise layouts when materials selected and included in the layout are found to be unavailable, sized incorrectly, text is incorrect, etc. • Review of Shop Drawings or Fabrication Drawings – Review and comment on shop or fabrication drawings. Ensure that the design intent is maintained, that measurements are correct, and that details are reasonable.
<p>93140000-ITQ-123 Project Manager – Exhibit Fabrication and Installation Services</p>	<p>Prime Contractors as Project Managers shall provide or assemble a team of professionals (Prime Contractor and/or Subcontractors) to provide a variety of Preservation Services.</p> <p>Overall project management shall include scheduling, coordination, and managing all aspects of work produced in close conjunction with the PHMC Project Manager and Museum/Site Administrators. Contractors qualifying under this category shall also responsible for the coordination and completion of the below subcategories for any awarded projects:</p> <p><u>Fabrication Services</u> – Purchase, fabricate, assemble and install into buildings all components for existing and/or new exhibits. Work must be fully coordinated with and adhere to specifications developed by exhibit designers. Work may be a variety of exhibit elements, including but not limited to panels, platforms, cabinetry, artifact cases, vitrines, immersives, audio visual and interactive stations, graphics, labels, signage, and kiosks. Fabrication work must be of museum quality with particular attention paid to using conservation approved materials, high quality fit and finish and ease of accessibility and maintenance. Fabrication should begin with preparation of a set of drawings and specifications for sign-off. Provide samples for all materials, colors and finishes specified for the exhibits. Review milestones will be set. Fabrication will be done in consultation with the Exhibit Designer and with PHMC staff. Fabrication should conclude with walkthroughs by PHMC staff and/or Exhibit Designer, development of a punch list of work for completion, development of the training manual, and providing required training as well as satisfactory completion and testing of the work. All fabrication work must confirm to Appendix C – Commission Display Materials and Exhibition Guidelines.</p> <p><u>Fabrication - Audio/Visual and Interactive Components and Lighting</u> - Purchase, fabricate, assemble and install into buildings and exhibit structures, and thoroughly test all electrical, electronic, and mechanical devices; this includes lighting, computers, touch screen and other interactive devices. Install audiovisual equipment into exhibit structures, including electrical components to provide and ensure fully operational audiovisual systems and/or interactive components for each exhibit unit. Shall provide all support documentation for A/V and interactive components including schematic and wiring diagrams and manuals and information about the type, life cycle and replacement cost of consumable</p>

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components such as bulbs and batteries. Provide training in maintenance of the exhibit to museum staff for the continued maintenance of exhibit components, and the selected Contractor(s) shall provide a maintenance manual for ongoing operation and maintenance of all A/V and electronic technology. All video presentations shall be open captioned for the hearing impaired. Audio description for individuals who are blind or have severe visual impairments may be required for important interpretive segments. Alternative access interpretive devices, such as videos or photo albums and audio descriptions may be required to describe inaccessible parts of the exhibit. Voice or motion activation units for visitor activated exhibits may be investigated. Digitization of images and film from archival collections may be explored. May require coordination of prototype/testing interactives. PHMC reserves the right to utilize the Bureau of Commonwealth Media Services (CMS) within the Department of General Services to produce audio/visual programs in-house; the Contractors involvement could be limited to script development and/or creative story boarding on any or all projects assigned in this category.

Conservation Services – Provide conservation services for preparation of artifacts or documents to be included in exhibits. Conservation services performed will be in conjunction with, and subject to review and approval by, the Collections Care Section of PHMC’s Bureau of Historic Sites and Museums (or, in the case of archival documents, the director of the State Archives or his/her designee). Survey artifacts and prepare prioritized condition reports for future treatments, prepare treatment proposals and cost estimates for each artifact, and perform artifact treatment. Documentary photographs shall be taken before, during and after treatment. Conservator shall specify requirements for mounts for special needs artifacts and will review exhibition specifications and design drawings to ensure that exhibit case design, case and mount materials, lighting levels, ultraviolet light filtration, and environmental parameters (both in the overall space and for exhibit cases) proposed by the exhibition design staff meets the needs of the artifacts and meets the standards established by PHMC. Conservator shall assist with exhibit installation.

Operation and Maintenance Plans - Prepare exhibit operation and maintenance plans and manuals for the ongoing operation and maintenance of new exhibits and other components constructed and/or installed under a statewide contract for services. Manuals shall document the materials and products used and describe the methods and products to be used for operation, care, cleaning and maintenance. This shall include a routine of care and cleaning for the life of the exhibit. The operation and maintenance plan and manual shall include all installed components, including all exhibits, lighting, audio visual and interactive components.

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Training – Provide training which will consist of working with PHMC site staff in a small group workshop to increase the site staff’s skills and knowledge of operating, caring for and maintaining the exhibits and other installed components. Training shall follow the format of the exhibit maintenance plan and manual. Provide information on how to maintain climate controls in exhibit cases if necessary. Provide training which will include hands-on demonstrations of how various exhibit components work (including all audio visuals and interactive components), control systems, access for maintenance, use of special tools, equipment or products and methods.

Exhibit Renovation and Maintenance – Provide a plan, drawings and specifications to preserve, repair, or renovate exhibit exhibits which are designated to be continued in use. Work may include, but is not limited to: replacing exhibit mounts, replacing exhibit components, refinishing materials, cleaning materials, providing new labels or graphics and doing various repairs. Actual Exhibit Renovation and Maintenance work may be done under this contract, by PHMC site staff, or by separate Supplier upon determination by PHMC.

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<p>93140000-ITQ-124 Project Manager - Preservation Services</p>	<p>Prime Contractors as Project Managers shall provide or assemble a team of professionals (Prime Contractor and/or Subcontractors) to provide a variety of Preservation Services.</p> <p>Overall project management shall be executed proactively and professionally to schedule, coordinate, oversee, and manage all aspects of work produced in close conjunction with the PHMC Project Manager and Museum/Site Administrators. Contractors qualifying under this category shall also responsible for the coordination and completion of the subcategories listed below for any awarded projects.</p> <p>Historic site planning, including historic structures reports, historic landscape reports, historic site master plans, historic furnishings plans, cyclical maintenance plans and related planning studies.</p> <p>Historical research (architectural, social, labor, industrial, military and transportation history.)</p> <p>Archaeological surveys, excavations, processing artifacts and preparing reports.</p> <p>Historic structure condition assessment, analysis and recommendations for treatment and scope of work.</p> <p>Diagnostic testing and analysis of historic structures, including testing for moisture, humidity, temperature, salts, structural movement, vibration; environmental testing and monitoring for asbestos, lead, mold and other contaminants; performing energy audits and analysis of potential energy conservation measures.</p> <p>Analysis of historic materials and finishes, including, but not limited to, paint, wood, plaster, mortar, stucco, stone, metals, and analysis of hazardous materials (i.e. asbestos, lead paint, radon, fuels, chemical leaks).</p>
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	<p>Analysis/Consulting in historic and period interiors, including, but not limited to, decorative plaster, decorative paint finishes, wallpapers, window treatments, carpets, fabrics, and historic lighting.</p> <p>Analysis/Consulting in specialized historic structures, including, but not limited to, mills, log structures, timber frames, historic railroad structures/equipment, historic ships and boats.</p> <p>Entomological consulting for Integrated Pest Management planning for historic structures and museums.</p> <p>Specialized historic preservation crafts/trades consulting, including, but not limited to, selective removals and replacement of materials needed to facilitate investigations and analysis of historic structures; participation in historic structure analysis and recommendations for treatment; and consulting on methods to replicate historic techniques of craft.</p> <p>Preparing documentation for historic structures and landscapes, including, but not limited to, HABS/HAER quality measured drawings, existing condition drawings, photography, rectified photography, 360-degree laser measurement and other documentation technologies.</p> <p>Training in topics related to a preservation project performed through this contract, or for a seminar/workshop in preservation (including any of the categories mentioned above).</p>
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REQUEST FOR QUOTES (RFQ) PROCEDURES: Commonwealth Agencies will issue an RFQ to qualified Contractors, through the Commonwealth’s Custom Portal, powered by the JAGGAER system. Contractors will respond to the RFQ in the system. The requesting Agencies may require the qualified Contractors to furnish, upon request, additional documentation in the RFQ. The qualified Contractors selected for the RFQ process will receive a Purchase Order (PO) and will supply the service to meet the specific requirements as indicated in the RFQ.

Agencies will exercise a scoring method based upon the criteria set forth in the RFQ. The Scoring Methods are defined as follows:

- Best Value
 - Refers to the process of selecting the quote which provides the greatest value to the agency based on evaluating and comparing all pertinent criteria, including cost, so that the Contractor whose overall proposal best suits the agency’s needs is selected for each individual project; and
- Low Cost
 - Refers to the lowest cost quoted from all proposals received that are deemed both responsive and responsible for the project.