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January 11, 2019

ADDENDUM #1 to the University of Florida ITN19KA-116 Strategic Planning and Consulting Services for the Samuel P. Harn Museum of Art at the University of Florida scheduled to be opened on **January 24, 2019 3:00 PM** at the University of Florida, Elmore Hall Conference Room, Radio Road, Gainesville, Florida.

This addendum shall be considered part of the Contract Documents for the above mentioned **ITN19KA-116** as though it had been issued at the same time and incorporated integrally therewith. Where provisions of the following supplementary data differ from those of the original document, this addendum shall govern and take precedence. All other terms, conditions, and regulations will apply.

This addendum consists of:

- Responses to technical questions and inquiries submitted prior to January 4, 2019.

Sincerely,

A handwritten signature in cursive script, reading "Kathy Aylesworth".

Kathy Aylesworth
Procurement Services

Please acknowledge receipt of Addendum #1 by signing below, and returning this addendum with your proposal. Failure to include addendum with your proposal may result in rejection.

Signature

Company Name

Company Address

City/State/Zip

Responses to questions submitted for ITN19KA-116 Strategic Planning and Consulting Services for the Samuel P. Harn Museum of Art at the University of Florida.

Q1. Our firm specializing arts and cultural community and strategic planning, and another firm, specializing in higher education strategic planning (among other sectors), are interested in this ITN. Our work is not only focused on art museums, but we work specifically with museums and cultural organizations for community and strategic planning and provide a comprehensive national perspective. Is this acceptable relevant experience, or are you seeking consultants who specialize in planning only with art museums?

A1. The Harn will consider proposals from qualified consultant(s) and firms and evaluate on their strengths, weaknesses and experience. There is no formal requirement that the experience is only with art museums.

Q2. Can you further detail the requirements for the “development and execution of a primary and secondary research plan” (1.2 Scope of Work)? Are there specific deliverables required for the research plan, or is the research simply to inform the writing of the strategic and business plans?

A2. The successful vendor will be expected to research the museum’s current state within the context of the art museum field. Deliverables will include a timeline and plan for gathering this data.

Q3. Section 1.2/Scope of Work in the ITN indicates analysis of existing data on baseline performance metrics. Does this specifically refer to the Measures of Success section outlined in the 2013-2018 (extended) Strategic Plan? Are there other performance metrics where data are being collected?

A3. Yes, there are additional performance metrics that will need to be identified and collected in this process. For example, attendance and audience engagement.

Q4. Can you provide more information regarding the type and number of stakeholders that the University and Museum expect to be involved in this process? Will it be a narrower group, including Museum staff and representatives from direct governing bodies? Or will consultation include broader groups such as students, public members, other cultural organizations in Gainesville, etc.?

A4. Part of the current state analysis will be identifying all key stakeholders. Museum staff has identified many, including those listed above (students, public members, other cultural organizations in Gainesville, etc.).

Q5. How will the National Council be involved in the strategic planning process? Will they have advisory capacity or approval capacity?

A5. The director of the museum has final approval of the Harn’s Strategic Plan. The Harn National Council will serve in an advisory capacity and will be a key stakeholder to the plan, but will not approve the final plan.

Q6. Who will ultimately approve the plan?

A6. The director of the museum will ultimately approve the strategic and business plan.

Q7. Who will the consultant be working with at UF specifically and will there be a single point of contact?

A7. The lead point of contact will be the director of the museum. The primary team assigned to this project is the senior leadership of the museum, led by the director.

Q8. What's driving the need for this initiative at this time?

A8. The new director began in July of 2018 at the same time the museum's 2013-2018 strategic plan was due for renewal. A one-year extension is currently in effect. For more information about the 2018-2019 extension, please visit: <http://harn.ufl.edu/linkedfiles/harnstrategicplan-extension18-19.pdf>

Q9. Has similar Planning initiative(s) been undertaken by Harn the past? If yes, can you please provide details?

A9. The Harn Museum opened to the public in September of 1990. The first strategic plan was developed in-house in 1993, followed every five years with a revised plan developed and approved in 1998, 2003, 2008 and 2013. An outside consulting firm was engaged for the 2003 plan and for each succeeding document.

Q10. Is there an incumbent currently providing any of the services outlined in the scope of work? If so, could you identify?

A10. No; there is no incumbent currently providing this scope of work.

Q11. What professional disciplines or areas of expertise do you think are needed to complete this project? Every museum has a different complement of staffing, so please be specific in your response as we need to understand the internal working of your organization.

A11. Experience working with non-profits (museums specifically) and demonstration of ability to produce successful strategic plans for those museums. For more information about the Harn's leadership and staffing, please visit: <http://harn.ufl.edu/staff>

Q12. Related to the above question, will you need external consultants for the following: Architecture, Collections, Student Access (Outreach & Engagement), Development (Fundraising), Branding, & Broader Community Engagement?

A12. These needs will be determined by museum staff in working with the successful consultant. Some of the areas identified in the above question may become strategies of the plan.

Q13. Can you clarify the type / format for the financial proposal you would like to receive? The ITN states "Vendors should provide a detailed hourly fee schedule for the lead consultant and all position levels at the company who would be assigned to this project. Please do not provide a lump sum price." Are you seeking a fixed-fee proposal that is broken out by both scope and rate by consulting staff? Or are you seeking a proposal on a time expended-basis, with hourly rates for each employee that will then be multiplied by actual hours spent on the project?

A13. Pricing should be proposed on a project and time expended basis, with hourly rates for each employee that will then be multiplied by actual hours spent on the project.

Q14. Can you provide a budget range for the project?

A14. There is no fixed budget for this project, however this solicitation process is only carried out for projects estimated to be over \$75,000. The final scope of work will be negotiated and pricing will be reflective of the scope.

Q15. The ITN shows a timeline through November 2019, and a term of agreement for five years. Can you clarify what the expected involvement would be beyond November 2019?

A15. The timeline of deliverables spans through November 2019 allowing for the option to shift the schedule slightly based on mutual agreement between consultant and the Harn director. The five year term provides the museum an option to engage additional services from the awarded vendor should the need arise. For example, a check-in or evaluation midpoint in the strategic plan.

Q16. Can you please provide the anticipated timeline for the project (e.g. project launch, and conclude the project)?

A16. The below timeline is taken directly from the ITN Scope of Work, Section 1.3, for the anticipated deliverable dates and final plan delivery:

2019	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
Current State Analysis with Consultant									
Interviews with Key Stakeholders									
Write Plan									
Create 5-yr Financial Plan									
Final Plan delivery									

Q17. Is there a specific event toward which this project is targeted?

A17. No.

Q18. What will be the most important factor(s) in considering all submitted proposed plans?

A18. Proposals will be evaluated based upon how well each respondent's plans meet the needs of the Museum and University. In no particular order or weighting, proposals will be evaluated using the Evaluation Criteria provided in the ITN, Section 2.1 'Method of Award'.

Q19. Is there a preferred methodology the Harn team wants to follow for this project? If yes, can you please elaborate and is the Harn team open to an alternative methodology and approach for the project?

A19. The Harn is looking to the planning consultants to propose a methodology, preferably one that has proven successful for other museums.

Q20. Will the business plan need to include a hospitality section?

A20. The business plan may include the Harn's Camellia Court Café but this will be determined in the planning process.

Q21. How many meetings on-site or otherwise do you anticipate? Once a week, once a month?

A21. The museum estimates four to six on-site meetings and brief weekly phone meetings with the museum director.

Q22. Who will conduct workshops and arrange meetings? Will this be the consultant's responsibility or will UF solicit participation and arrange this?

A22. The overall structure of workshops and meetings should be managed by the consultant. Role and responsibilities will be detailed further in the negotiation and/or planning process.

Q23. Can companies from outside of the USA submit a proposal?

A23. Yes.

Q24. Do consultants need to come to Gainesville for meetings?

A24. A site visit will be required of the vendor(s) who are selected to present and negotiate. The museum estimates four to six on-site meetings and brief weekly phone meetings with the museum director.

Q25. Can we perform tasks related to this ITN outside of the USA?

A25. Yes.

Q26. Can we submit the proposals via email?

A26. No; please see Section 4.0.

Q27. Is there a page limit for the response?

A27. No.

Q28. It's our understanding there is no HUB requirement for the project. Correct?

A28. While there is no HUB (Historically Underutilized Business) requirement, the University of Florida is an equal opportunity institution and, as such, encourages the use of small businesses, including women and minority-owned small businesses in the provision of goods and services. Value through the use of small and diverse businesses can be proposed in Tab 5, "Best Value." Vendor shall use good faith

efforts to ensure opportunities are available to small businesses, including women and minority-owned businesses. For questions about the University's Small Business Program contact the Director of Small Business and Vendor Diversity, 352-392-0380, <https://sbvdr.admin.ufl.edu/>.