

Request for Qualifications
Marketing Consultant
December 21, 2004

I. General Information

A. Overview of Services Requested and the Submission Process

As part of its successful development, the International Freedom Center ("IFC") needs the services of one or more marketing firm(s) to assist in the Center's strategic marketing development. At least one of the marketing firm(s) will be asked to prepare a document outlining the Center's proposed marketing positioning plan, key marketing strategies a roadmap for developing its primary marketing tactics in time for the scheduled opening in 2009, and an early projection of marketing costs during the Center's first years of operations in its new building at the World Trade Center site. This strategic marketing document will be part of the required deliverables for the Feasibility Planning and Schematic Design Phase submitted to the Lower Manhattan Development Corporation ("LMDC"). A more detailed scope of service can be found in Section II. Subsequent to the feasibility planning and schematic design phase, the scope of services is anticipated to include supplementing, updating, reviewing and testing information previously developed through the LMDC feasibility planning and schematic design phase.

The IFC seeks to create a pool of qualified firms from which it may select one or more firms to provide such services in the future. The IFC may select multiple firms to provide some of the requested services for the Center or the IFC may select a single firm to provide all of the services necessary for the completion of the marketing document. The selection process for this RFQ will involve the IFC and follow U.S. Department of Housing and Urban Development ("HUD") rules and regulations for a fair and open competitive selection process. Firms interested in submitting statements of qualifications are required to follow the recommended guidelines and instructions contained in this Request for Qualifications ("RFQ"). In the event it becomes necessary to revise any part of this RFQ, revisions will be provided by addenda and sent via e-mail or otherwise noted line of communication.

The initial period of service will be one-year (commencing January 1, 2005 to January 1, 2006.) The IFC may contract with the chosen Marketing Firm(s) for a portion of contracted time and/or to continue the development of a marketing strategy after the one-year period, but shall have no obligation to do so.

Statements of Qualification should provide a straightforward, complete and concise description of the firm's capabilities to satisfy the requirements of this RFQ. Please prepare (4) hard copies of your Statement and work samples and one (1) electronic version. Each hard copy of the statement of qualifications should be bound in a single volume and include any documentation you may wish to submit. By submitting a written

statement, each firm will be deemed to agree that the IFC shall thereby be assigned ownership of the drawings and other documents and materials prepared for the RFQ and submitted with the statement and any research concepts expressed therein (and all copyright or other rights pertaining thereto), excluding of course the firm's brochures, and any designs or materials relating to other projects included as examples or for reference to the firm's work for other clients.

Qualifiers submitting a statement of qualifications in response to this RFQ may be required to give an oral presentation of their statement to the IFC. This oral presentation may provide an opportunity for the firm(s) to clarify or elaborate on the statement of qualifications but will in no way change the original submission. Engagement staff should be present at the oral presentation. The IFC's request for an oral presentation shall not constitute acceptance.

Statements of qualifications must be received no later than 5:00PM, January 4, 2005. Deliver all hard copy statements to:

RFP/RFQ Processor
Debra Weinstein
Attn: Marketing Strategy Document RFQ
c/o Chelsea Piers Management, Pier 62 Suite 300
New York, NY 10011

Email electronic version to:
Dweinstein@ifcwtc.org

The IFC reserves the right to reject any or all statements of qualification submitted if such election is deemed to be in the best interest of the IFC. The IFC assumes no obligation, no responsibility, and no liability for costs incurred by the responding firms prior to the issuance of a contract. The IFC reserves the right to negotiate with one or more firms submitting statement and to accept any bid or negotiated proposal which the IFC deems best or most appropriate for purposes of the project and the public interest, whether or not lower in the aggregate or in any detail than any other proposal.

The current schedule for this effort is as follows:

- December 22nd, 2004 – RFQ Issued
- January 4th, 2005 – Responses due
- January 7th, 2004 – Firms Selected

Subject to review and approval by the IFC, the selected firms will be retained for one year with an option for the IFC to renew.

B. Background of the International Freedom Center

On June 10, 2004 the Governor, the Mayor and the LMDC selected the IFC from over one hundred applicants to stand as the only building on the four-acre World Trade Center

site. The IFC is a new organization created expressly for the site. The IFC will be housed in a new building constructed at the southwest corner of the newly-restored Fulton and Greenwich Streets and will serve as a gateway to the World Trade Center Memorial.

In the tradition of institutions like the United States Holocaust Memorial Museum in Washington, D.C and in like-minded spirit to organizations such as the International Coalition of Historic Site Museums of Conscience, the IFC seeks to harness the power of history and use it as a springboard for contemporary dialogue, debate, and engagement. It will do this in collaboration with leading arts, cultural, media and academic institutions. Over the past two years, the IFC has reached out to an extraordinary roster of scholars, educators, museum directors, and cultural leaders who provided their input and expertise. A Committee of Scholars and Advisors and a Planning Committee both emerged from this outreach. Both groups continue their efforts to develop the IFC's content.

C. Vision and Mission of the International Freedom Center

The International Freedom Center will be a world-class place of education and engagement, helping people to understand, appreciate and advance freedom's narrative of hope. The Center will be an integral part of humanity's response to September 11, rising from the hallowed ground of the World Trade Center site, and serving as the gateway and complement to the World Trade Center Memorial.

The International Freedom Center seeks to educate, inspire and engage people around the world to consider freedom's promise, to feel freedom's power and to act in freedom's service. The Center will include three major components: a museum of freedom, an educational and cultural center and an engagement program. Permanent and temporary museum exhibits will illuminate humankind's sometimes uneven but ultimately enduring aspiration for free and open societies. Educational and cultural programs, both physical and virtual, will conduct a global conversation on freedom in our world today, and provide a place where freedom's stories are collected. The International Freedom Center will also spur and channel individuals to engage in service designed to promote freedom, in their own communities and wherever freedom's work remains unfinished.

II. Anticipated Scope of Services

The IFC seeks one or more marketing firms to engage in strategic marketing support for the IFC. Specifically, the IFC would like to create a pool of several firms that it deems qualified from which it can draw on to obtain marketing services in the future on an as-needed basis. A firm's selection into this pool does not necessarily guarantee actual retention of such firm for the proposed services.

The IFC requests statements of qualifications for one or more firms to provide services to the IFC in the future, as requested, which will include, but will not be limited to the services identified below.

Strategic Marketing Document

- The IFC has been developing and refining its corporate identity and positioning. Included in the LMDC deliverables, the IFC must submit a strategic marketing document that lays out the Center's strategy and plan.
- The IFC needs the marketing firm(s) to produce a marketing position plan that investigates and evaluates the unique needs of the IFC as a consequence of its location and significance at the WTC site.
- The document needs to provide a well-researched systematic marketing approach for the IFC that helps to define the key marketing strategies.
- In combination with the marketing positioning plan and outlined key marketing strategies, the marketing firm needs to produce a roadmap to developing the Center's primary set of marketing tactics in time for its opening in 2009, and an early projection of marketing costs during the Center's first years of operations in its new building at the World Trade Center site.

Weekly Attendance and Participation

- The marketing firm(s) is expected to attend weekly meetings with IFC staff members to discuss marketing strategy.
- The marketing firm(s) should efficiently and economically utilize the IFC Committee of Scholars and Advisors to inform its research.

III. Anticipated Schedule for Services

The IFC reserves the right to reserve the services of the research firm(s) for all or part of the one-year term.

LMDC Deliverables LMDC Feasibility Planning and Schematic Design Phase

- The IFC may engage the services of the marketing firm(s) for approximately a six (6) week time frame in conjunction with and to be submitted as part of the LMDC deadline for the Feasibility Planning and Schematic Design Phase deliverables.
- The Six (6) week time period will begin immediately on January 7, 2005 and conclude on or about February 15, 2005 or a later date to be determined by the LMDC.

- The strategic marketing document will expand upon the vision and goals for the Center developed by the IFC throughout the Feasibility Planning and Schematic Design Phase.

One Year Contract

- The IFC may engage the services of the marketing firm(s) for any allotted amount of time within the one-year initial period.
- The research firm(s) may be requested to compose a portion of the strategic marketing topic on a specific tactic and subject for a mutually agreed upon period of time within the one-year initial period.

IV. Submission Requirements

Please limit your responses to ten (10) one-sided pages, except work samples, which must be included in a separate, bound appendix. The IFC has no preference that all services are provided by the same firm and firms may choose to submit qualifications to provide less than all of the anticipated scope of services. Responding firms must specify which services they are qualified to provide. The IFC will review all statements of qualifications without prejudice as to which services are proposed.

Qualifications, Experience, and Staffing

- Provide a history of the marketing firm(s)'s experience working with projects of similar size and scope, specifically working with not-for-profit institutions and museum venues.
- Provide a history of the firm's experience working with economic development corporations, municipalities, state and federal government agencies, private developers and civic organizations.
- Provide an overview of the firm's work. Please include budget size of projects, name of clients and subcontractors with contact information, your scope of work, and your fees for services.
- Describe your organizational structure, specifically identifying those individuals who would be assigned to work directly on the project with the IFC. Please include resumes of key staff in the appendix.
- Describe the unique qualifications and relevant work experience of staff that would be designated to work with the IFC on this project.
- Demonstrate capacity of the firm to designate appropriate principal and support staffing for the duration of a project of the size and scope described in the RFQ.

- Demonstrate ability of the firm to comply with the selection criteria as outlined in *Section IV (“Selection Criteria”)*.
- Provide three (3) references for each of clients and subcontractors. Include the projects worked on and contact information, including name, title, address, telephone number, and email address.

Fee (This does not count toward the 10-page limit)

- Please provide a proposed fee for all services based on the scope of services described in this RFQ, inclusive of all subcontractors’ costs.
- Provide a fee schedule.
- Provide the normal hourly rate for all principals and staff who would be designated to work on this project. If different, provide the hourly rate used in the calculation of the fee proposed for this project.
- List anticipated reimbursable expenses and the rate charged for each without markup.
- Please indicate any reduced fees offered to organizations as not-for-profit under Section 501(c)(3) of the Internal Revenue Service, and if these fees were incorporated into the Consultant’s proposed fee.
- If any, indicate other fees or charges not included in the Consultant’s proposed fee.

Contact Information (This does not count toward the 10-page limit)

On a single cover sheet in your statement of qualifications, please provide the following:

- The lead firm or individual name;
- The lead firm’s contact person;
- Telephone, fax, and wireless numbers for principals or staff working on the project;
- Email address of firm principals and staff who would work on the project;
- The street address of the firm;
- The firm’s founding year;
- The M/WBE status of the firms, if applicable;

- The type of work or specialty and the size of the firm; and
- The dated signature of the firm's principal.

Conflict of Interest (This does not count toward the 10-page limit)

- Submit a statement describing any potential conflict of interest or appearance of impropriety, relating to other clients of the Consultant, or officers, directors, and employees of the IFC or other groups involved in the rebuilding of Lower Manhattan, that could be created by providing services to the IFC.
- Indicate what procedures will be followed to detect and notify the IFC to resolve any conflicts of interest.
- Indicate any pending litigation and/or regulatory action by any oversight body or entity that could have an adverse material impact on the firm's ability to meet its obligations to the IFC.

Nondiscrimination Policy (This does not count toward the 10-page limit)

- Firms with 50 or more employees shall submit a copy of their nondiscrimination or affirmative action plan.
- Firms with fewer than 50 employees shall submit a statement of their commitment to equal opportunity and affirmative action from their chief executive officer.

IV. Selection Criteria

The IFC requires the firm to meet and document the following minimum qualifications to be eligible for consideration.

Qualifications

- 5 years experience providing research for projects of similar scope and size.
- Experience on three (3) projects similar in nature and scale.
- Approaches in methodology with respect to the anticipated scope of services that demonstrate maximum comprehension of and ability to provide such services to the IFC.
- Experience working on at least three (3) projects in urban environments.
- Experience working with multiple institutions.

In addition to the aforementioned criteria for eligibility, the IFC will consider the following in evaluating statements of qualifications:

- Level of excellence as demonstrated by submitted examples of past projects of similar scope and size.
- Level of excellence as demonstrated by the experience of past clients of the firm.
- The ability of the firm to complete projects with fast-track schedules and to maintain project budget.
- Experience working on complex projects involving numerous stakeholders including government agencies, civic organizations, private developers, and the public.
- Experience working with nonprofit cultural organizations, especially those in the museum field.
- Past experience of working on projects in New York City.
- Innovative or outstanding work by firm that demonstrates the firm's unique qualifications to provide services.
- Projected cost of services.
- Selected firm's staff ability, availability and facility for working with IFC directors, officers, staff, and consultants.
- Experience of firm and employees to be assigned to the project in general and in particular, providing consulting services to non-profit entities, municipalities, economic development organizations, or other governmental entities.

Contract Terms and Requirements

Selected firm(s) will be required to enter into a formal contract with the IFC that will include the terms and conditions set forth in this RFQ, subject to applicability and amendment. The contents of the statement of qualifications prepared by the selected firm(s), with any amendments approved by the IFC, will become a part of the contract awarded as a result of this RFQ process. Entering into such a contract does not guarantee that selected firms will be hired to perform research services during the term of the contract. The IFC reserves the right to incorporate the contents of the statement of qualifications, and any corresponding addendum approved by the IFC, of the selected firm into the signed contract agreement at its discretion.

The selected firm will be required to:

- Maintain accurate accounting records and other evidence pertaining to costs incurred in providing services and provide to the IFC a copy of all such records and evidence. Additionally upon request, make such records available to LMDC, or any applicable auditing agency at all reasonable times during the contract period and for four (4) years after the date of the final payment to the firms under the contract.
- Assume sole responsibility for the complete effort as required by this RFQ, and be the sole point of contact with regard to contractual matters.
- Refrain from assigning, transferring, conveying, subletting or otherwise disposing of the contract or its rights, titles or interest therein or its power to execute such agreement to any other person, firm, partnership, company, or corporation without the prior consent and approval in writing of the IFC.
- Comply with applicable laws governing projects initiated or supported by the IFC, including all applicable HUD requirements and regulations.

The IFC may select more than one firm that responds to this RFQ to create a pool of qualified firms from which to draw from for the IFC's future marketing needs.

The IFC reserves the right to terminate any contract entered into as a result of this RFQ at any time, provided that written notice has been given to the firm at least thirty (30) days prior to such proposed termination date.

V. Miscellaneous Conditions

Obligation Only on Formal Contract

The issuance of this RFQ, the submission of a response by any firm, and the acceptance of such response by the IFC do not obligate the IFC in any manner. Legal obligations will only arise on the execution of a formal contract by the IFC and the firm(s) selected. Responses to this RFQ will be prepared at the sole cost and expense of the proposing firms. No materials submitted in response to this RFQ will be returned.

This RFQ is subject to the terms and conditions of an engagement agreement to be specified by the IFC and mutually agreed upon by the marketing firm(s) and the IFC following the selection of a successful qualifier and prior to commencement of work.

The fees payable to the marketing firm(s) are expected to be funded and/or reimbursed by the IFC as a subrecipient of HUD block grants provided to LMDC, and expenditures to and of the marketing firm(s) will be required to be certified to and to conform to the applicable rules and regulations of HUD, LMDC and New York State to the extent required by the rules and regulations of such agencies.

Reservation of Rights

The IFC may amend, modify, or withdraw this RFQ; revise requirements of this RFQ; require supplemental statements or information from any firm; accept or reject any or all responses hereto; extend the deadline for submission of responses hereto; negotiate or hold discussions with any respondent and to waive defects and allow corrections of deficient responses which do not completely conform to the instructions contained herein, and; cancel this RFQ, in whole or part, if the IFC deems it in its best interest to do so. The IFC may exercise the foregoing rights at any time without notice and without liability to any proposing firm or any other party for their expenses incurred in the preparation of the responses hereto or otherwise.

Nondiscrimination and Affirmative Action Policies

It is the policy of the IFC to comply with all federal, state and local laws, policies, orders, rules and regulations which prohibit unlawful discrimination because of race, creed, color, national origin, sex, sexual orientation, age, disability or marital status.

Additionally, the IFC will take affirmative action in working with contracting parties to ensure that Minority and Women-owned Business Enterprises (“M/WBEs”), share in the economic opportunities generated by this project. The LMDC, as a subsidiary of Empire State Development Corporation (ESDC), follows ESDC’s non-discrimination and affirmative action policy. This policy will apply to any contract entered into as a result of this RFQ. LMDC has established a 20% M/WBE participation goal for its entire redevelopment project. The selected firm(s) shall be required to use best efforts to provide for the meaningful participation of the United States M/WBE’s in the execution of this contract. A copy of each responding firm’s equal employment opportunity policy statement shall be included as part of the response to the RFQ. The ESDC Affirmative Action Unit (“AAU”) is available to assist you in identifying M/WBE’s certified by the State of New York that can provide goods and services in connection with the contract anticipated by this RFQ. You can obtain a M/WBE listings by calling the AAU at (212) 803-3224.