
REQUEST FOR PROPOSAL
The Barack Obama Foundation

ISSUED SEPTEMBER 2014

Request for Proposal

Overview & Background

ABOUT THIS DOCUMENT

In March of 2014, The Barack Obama Foundation (Foundation) released a Request for Qualifications (RFQ) intended primarily to solicit responses from institutions of higher learning, not-for-profit organizations, private developers or municipalities that wish to sponsor, develop and maintain a multi-unit facility consisting of the Barack Obama Presidential Library (Library), the Barack Obama Presidential Museum (Museum), the Foundation offices, an academic institute (Institute) and a broader campus. This multi-unit facility is hereinafter referred to as the Project.

The purpose of this Request for Proposal (RFP) is for the Foundation to review formal proposals and qualifications in order to select a site and partner for the Project.

This is not a formal solicitation and the Foundation reserves the right to enter into negotiations with one or more partners based on their responses to this RFP or to request that one or more partners respond as part of a formal solicitation process. This RFP does not commit the Foundation to enter into negotiations and/or select any partner. This RFP does not create a binding obligation on the part of the Foundation with any partner or others involved in their RFP response.

ABOUT THE FOUNDATION

The Foundation, officially established as an operating, 501(c)(3) nonprofit corporation in January of 2014, will both plan and develop the Project and engage in activities reflecting President Obama's values and priorities throughout his career in public service: expanding economic opportunity, inspiring an ethic of American citizenship and promoting peace, justice and dignity throughout the world. The Project will be an anchor for economic development and help cultivate a strong relationship in the surrounding community. In addition to the Library and Museum, it will include an Institute that will enhance the pursuit of the President's initiatives beyond 2017 and have local, regional and global impacts. The Foundation will raise private funds, convene partners who share the President's goals and vision, serve as a repository of information and otherwise marshal resources to address present and future global and domestic challenges of interest to the President. The Foundation is governed by a volunteer board of directors and chaired by civic leader Martin Nesbitt.

The Foundation will serve as the vehicle by which the Library, Museum and Foundation offices are constructed, and, in accordance with the statutory requirements outlined in the Presidential Libraries Act, by which the endowment necessary for the National Archives and Records Administration (NARA) to operate the Library is created and funded. The Foundation anticipates negotiating a joint use agreement with NARA in the future that will outline the responsibilities of both the Foundation and the federal government.

Guiding *Principles*

As initially articulated in the RFQ, the following are guiding principles that inform and reflect the overarching vision for the Project. The principles are organized into three distinct, but interrelated, sections.

CORE addresses tangible components of site and facility; it also deals with economic development impacts of site selection.

PROGRAM attends to principles most closely associated with President Obama's time in office and the work of the Foundation.

CONTEXT situates the project in relation to host institution and other community stakeholders.

Guiding Principles (Cont'd)

Core

The “Core” principles apply mostly to the site and physical facility of the Library. They are concerned with factors that impact space planning, character and quality of architectural design, site plan, ongoing operations and maintenance and economic impact.

ECONOMIC ENGINE

Encourages smart and sustainable economic growth

Anchors public and private investment

Celebrates and leverages existing community assets

Civic identity is shaped by community

Identified as part of the fabric of the community

FLEXIBLE & FORWARD-THINKING

Agile, flexible, and relevant — continually reinventing itself

Accommodates a variety of uses

Is technologically responsive

Uses best practices in sustainability, technology, and operations

Exercises leadership and foresight, anticipating change

FUNCTIONAL

Rational, purpose-driven design

Attentive to site, infrastructure, existing urban fabric

Efficient in systems, materials, and operations

State-of-the-art archives and museum

Cost-effective

TECHNOLOGICALLY ADVANCED

- Extends digital footprint
- Next-generation platform
- New models for social interaction
- Can adapt with changes in technology

ACCOUNTABLE & PERFORMANCE-DRIVEN

- Responsible steward of the environment — immediate and global
- Energy-efficient building
- Exceeds LEED Platinum standards
- Sustainable practices
- Embodies principles of biomimicry to create a living building

UNIFIED DESIGN VISION

- Consistently expresses design principles, mission, and vision
- Aligns with programmatic goals
- Communicates a clear and coherent message
- Integration of site and building design

Guiding Principles (Cont'd)

Program

Principles in the “Program” section pertain to the mission and vision of the Library and Foundation. They consider the ways in which the Presidential Office and, more specifically, the legacy of President Obama, may be manifested through the Library.

AUTHENTIC

Represents ideals of the Obama campaign: respect, empowerment, inclusivity

Represents and explains the presidential legacy

Inspires an ethic of citizenship

Tells a compelling, accurate story about the President’s life, service, and vision

Approachable and immediately resonating with visitors

Reveals the complexity and inspiration of the office of the President

Empathetic and respectful of other viewpoints

CIVIC

Communicates the ideals of democracy

Celebrates community character

Articulates a compelling, shared vision

Generates discourse and dialogue

Informs and engages policy debates

HEALTH & WELL-BEING

Promotes a healthy, wholesome environment

Contributes to a cleaner, safer planet

Supports a healthy lifestyle

Nurtures the next generation

GLOBAL

Creates a new international destination

Serves as a gateway to other cultural, civic, and academic resources in the region

Establishes a global network to communicate ideas and aspirations

Collaborates with like-minded institutions around the world

INSPIRATIONAL

Emotionally resonates with visitors and the surrounding community

Ethically forthright

Reflects and reinforces the Obama legacy

Emits a spirit of optimism and hope

Empowers visitors to create change and make a difference

PURPOSEFUL

Attuned to programmatic needs and symbolic significance

Each element responds to a central idea

Accommodates reflection, exploration, learning, and conversation

Focused on service — to visitors, local and international communities, and the nation

Guiding Principles (Cont'd)

Context

Principles in the “Context” section deal with the interface between the Library and the community it serves – at the immediate, regional, and global scales. This set of principles considers the function of the potential host and the myriad connections between the Library and the community.

ENGAGEMENT

Accessible to people of all ages, abilities, backgrounds and socioeconomic status

Fosters intellectual discourse and disagreement

Prizes and responds to audience needs

Provides real-time, immediate connection

Partners with other organizations to share ideas, resources and audiences

WELCOMING & TRANSPARENT

Open and welcoming to all visitors, physical and virtual

Clear and accessible communication with constituents

Actively advances intellectual and cultural openness

Uses collective intelligence and social media to collaborate with people

INNOVATIVE

Incubates new ideas and approaches

Nurtures thinkers, artists, activists and change agents

Creates a space for investigation and experimentation — civic, technological and academic

Interfaces with social sector startups

CONNECTED

Hub of physical and technological networks that enable exchange and collaboration

Serves as a dynamic visitor destination for national and international visitors

Extends a compelling virtual presence through digital media

Sited in an easily accessible, multimodal transportation environment

INQUIRY

Welcomes individual expression and multimodal learning

Intellectually honest and rigorous

Expects and promotes academic excellence

Facilitates scholarly research as well as Informal learning

Fosters a climate of intellectual curiosity and openness

Response

Address the questions in this section fully, using as much space as necessary. Include images and diagrams as needed. Responses should be in the same numerical order as the corresponding questions. If you believe that your RFQ response adequately addressed any of these questions, please note so in your response.

A. ORGANIZATION INFORMATION

1. An executive summary articulating the long-term strategic vision for the university, including its global footprint and vision, as well as any existing or projected expansion plans. Detail any complementary relationship with the Project.
2. Biographies of administrators, faculty and staff assigned to the Project, including a summary of responsibilities and an organizational chart indicating reporting relationships both internally and with appropriate personnel of the Foundation. Information should include staffing for academics, fundraising, communications, marketing, real estate development and construction and facilities management.
3. List of external consultants engaged by you in support of the Project. Please provide their qualifications, responsibilities and projected fee structure.
4. Summary of any formal or community-based partnerships with the university that are relevant to the Project.
5. Summary of the diversity of the university's employees, including demographic composition (e.g., race, gender) allocated by role (e.g., administrative board, secretarial, tenured faculty, associate faculty).
6. Description of the university's long-term diversity goals and the plan to achieve them.
7. Description of the university's level of experience and success with work similar to the Project:
 - i. Include detailed presentations of the most relevant projects demonstrating success in large-scale, multi-use development.
 - ii. Emphasize developments where the proposed team members have worked together and had primary involvement in leading the project.

Response (Cont'd)

B. SITE AND DEVELOPMENT INFORMATION

1. Provide the following with respect to the site(s) under consideration:
 - i. Existing title reports of the proposed site(s), together with documents specified therein.
 - ii. Existing ALTA plat of survey with clearly delineated easements, flood zones and/or designated wetlands.
 - iii. Existing environmental reports including, but not limited to, phase I and phase II reports, No Further Action Letters, geotechnical studies and topographic maps.
 - iv. Plan for land assembly, including anticipated costs for preparing the site for development (e.g., remediation, demolition of existing structures).
 - v. Circulation and traffic study highlighting how the Project will interact with existing uses, facilities and the neighborhood. Include information regarding ingress/egress and traffic mitigation.
 - vi. Estimated parking needs for both personal vehicles and tour buses, and any existing proposed availability for vehicles and buses in the surrounding area.
 - vii. Explanation of tax status of each site. If site is currently tax exempt, specify the basis for tax exempt status. If a site is taxable, specify the taxes imposed.
 - viii. Analysis as to whether the proposed use of the site(s) will be taxable. If so, please specify the taxes to be imposed.
 - ix. Current zoning applicable to the site(s), including set-backs, FAR, the specification of height and other similar restrictions on limitations.
 - x. Analysis as to whether the Project is permitted under current zoning. If not, provide a detailed explanation of rezoning process and timing.
 - xi. Assessment of public transportation alternatives serving the site(s) as well as any recommendations for improvement, if necessary, to support the proposed development. Assessment should include transit time by vehicle, bus rapid transit, train, boat, bike, etc. from central downtown location in your city.
 2. Detailed proposed process to obtain control of the site and convey it to the Foundation.
 3. Affirmation that the proposed site(s) will meet NARA's Architectural and Design Standards, as revised in July, 2014, related to site conditions. A copy of such standards will be emailed to you and concurrently posted on the website.
 4. Analysis of site-specific development risks and identified mitigation plans.
 5. Summary of other specific characteristics of the site(s) or immediately adjacent property that will benefit or hinder the construction, development or operation of the Project.
 6. Projected timeline listing activities and timeframes required to plan, design, develop and open the Project.
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Response (Cont'd)

C. SURROUNDING COMMUNITY INFORMATION

1. Information about the surrounding neighborhood most connected to the proposed site(s) and/or the area within a 1, 3 and 5-mile radius of the proposed site(s):
 - i. Inventory of existing complementary facilities or operations. For each, describe any existing relationship and potential partnership opportunities.
 - ii. Outline of existing community demographics, as well as future trends (e.g., population density, employment, home ownership, income level, age).
 - iii. Inventory of university partnerships with community organizations and other relevant affiliations. Describe these existing relationships and include any information that would impact the Project.
2. Details regarding zoning, ownership and current use of properties within a ½ mile radius.
3. Assessment of the economic benefit of the Project to the community. Include the positive and negative impacts of the development on the community.

Response (Cont'd)

D. ACADEMIC COLLABORATION

1. Vision for academic collaboration that will enhance the pursuit of the President's initiatives beyond 2017. The academic collaboration will include an Institute and possibly a degree-seeking program. An Institute may include academic research, undergraduate coursework offered in collaboration with existing academic departments, infrastructure to achieve real world impact and/or collaboration with partner universities.
 2. Overview of existing institutes and centers at the university. Please detail the following:
 - i. Institute focus (i.e., departmental-focus, inter-disciplinary)
 - ii. Faculty composition (e.g., home university professors, partner university professors, private sector and public sector leaders)
 - iii. Student opportunities (e.g., coursework, research)
 - iv. Funding mechanism (e.g., privately funded, university funded)
 - v. Collaboration with other universities
 - vi. Governance (include any external advisory councils or boards)
 3. Outline of your proposal for an Institute:
 - i. Institute focus (i.e., departmental-focus, inter-disciplinary)
 - ii. Faculty composition (e.g., home university professors, partner university professors, private sector and public sector leaders)
 - iii. Student opportunities (e.g., coursework, research)
 - iv. Funding mechanism (e.g., privately funded, university funded)
 - v. Collaboration with other universities
 - vi. Governance (include any external advisory councils or boards)
 4. If proposing a degree-seeking program, please provide the following:
 - i. Which (if any) current academic disciplines could be part of a degree program.
 - ii. List any ideas for new degrees or a combination of existing degrees.
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Response (Cont'd)

E. MARKETING AND ATTRACTION STRATEGY

1. Proposed strategy to attract visitors leading up to the Project opening and long-term to sustain attendance.
2. List of significant local attractions that may complement and help bolster attendance for the Project. For each, list:
 - i. Detailed historical attendance figures, including segmentation by demographics (e.g., local vs. tourist) and attendance over time.
 - ii. Proximity to the proposed site(s).
 - iii. Means and method of attracting the visitors to the Project from the attraction.
3. Projected attendance, both in the short-term (i.e., first five years of operation) and long-term (i.e., 20 years after opening). Include underlying assumptions and your method for reaching these projections.
4. Proposed plan for supporting the ongoing marketing and communications efforts of the Project.

Response (Cont'd)

F. UNIVERSITY CAPITAL COMMITMENTS AND OTHER SERVICES

1. Details regarding the capital commitment by the university to the development and construction of the Project, as well as funds available to support the annual operations of the Project.
2. Detailed master development plan for the surrounding community (academic and otherwise) that will drive economic revitalization, as well as increase connectivity to the university. Include any capital resources available for the plan.
3. Description of any plans to provide office space to the President, First Lady and staff beginning in 2017 until the opening of the Project.
4. Summary of services that the university will make available to enhance the Project, including but not limited to the items listed below:
 - i. Internal transportation (shuttle services)
 - ii. Security
 - iii. Parking
 - iv. Utilities
 - v. Technology
 - vi. Other facilities available to visitors

Response (Cont'd)

G. CITY, COUNTY AND STATE CAPITAL COMMITMENTS AND OTHER SERVICES

Summary of commitments the university believes it will be able to obtain from local, regional and state governments to enhance the development including, but not limited to, the following items:

- i. Funding, support and opportunities for educational partnerships with local schools
- ii. Park improvements
- iii. Streetscapes and landscapes in and around the Project and surrounding community
- iv. Other investments in surrounding area that will create jobs and spur economic development
- v. Tax Increment Financing (TIF)/other financing recommendations
- vi. Public safety
- vii. Multimodal transportation improvements (road, pedestrian and bicycle, transit opportunities)

H. DRAFT LEGAL DOCUMENTS

It is our intention to present draft legal documents for your review and comments prior to the RFP submission deadline. These documents will cover, among other things, the land transfer, development obligations and Institute structure and governance.

I. COLLABORATIVE PROCESS

We anticipate this will be a collaborative process, and as such, expect to have discussions with each of the respondents during the submission period.

Key Information

Summary Sheet

RFP Issue Date	September 15, 2014
Issuing Office	The Barack Obama Foundation
Point of Contact	Ms. Robbin Cohen
RFP Response Due Date	December 11, 2014 5:00 p.m. Central Time
RFP Response Format	4 hard-copies of all materials addressed as outlined below. Electronic versions of all materials should be included as part of the response. Electronic versions should be sent as a URL with a secure location containing a digital copy of the response book.
Further Reference:	Included on the Foundation website is the updated NARA Directive 1571: Architecture and Design Standards for Presidential Libraries, Revised July 2014. The standards can also be found at http://www.archives.gov/foia/libraries.html#design . For additional questions regarding NARA Standards, contact library.planning@nara.gov .

RESPONSES RECEIVED AT:

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