



# TRAIL HISTORICAL SOCIETY

## 2015-2018 STRATEGIC PLAN REQUEST FOR PROPOSALS

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### INTRODUCTION

The Trail Historical Society (THS) is requesting proposals for the preparation of a strategic plan which will be utilized by the THS Board of Directors to guide the management of the Society and the operation of a new museum and archives for the period 2015-2018.

### CONTEXT

Below is a description of the current facilities operated by the THS.

#### Trail Museum

The Trail Museum is located in the Trail Memorial Centre, a major municipal recreation facility on Victoria Street (Highway 3B) adjacent the City's downtown area. It is 600 square feet in size and contains a number of historical exhibits in wooden display cases. It is deemed inadequate to effectively describe the history and culture of the community.

#### Trail City Archives

The Trail City Archives is located on the second floor of City Hall. It lacks space to properly care for its collections in an environmentally safe manner.

#### Trail Sports Hall of Memories

The Sports Hall of Memories consists of 22 display cabinets located in the Trail Memorial Centre adjacent the Trail Library. The exhibits describe the history of sports in the

community and honour those who have made significant contributions to their chosen sport. The exhibits lack adequate space to effectively display the historical items and environmental controls.

The THS employs a full time Museum and Archives Director and their offices are located in City Hall adjacent the Archives.

The THS has a Strategic Plan in place for the period 2007-2012 that is now out of date and does not address the changes the Society will undergo with the operation and management of a new museum and archives.

For many years the THS has pursued plans to build a new museum and archives for the community. In 2013, City Council agreed to provide land in the downtown area to construct a building to house a new museum/archives and library, subject to the project passing a referendum to finance the project. The referendum took place on November 15, 2014 and was successful. The City will be taking steps to hire an architect to design the building by the spring of 2015. The THS believes it requires a strategy and comprehensive action plans that will enable it to effectively prepare for operating a new museum and archives. It is estimated the new museum and archives will be open by the summer of 2017.

#### PURPOSE OF THE STRATEGIC PLAN

- To establish new directions for the Trail Historical Society over the 2015-2018 period and to provide guidance to address them. Specifically, the Plan will assist the THS in maximizing the opportunities open to it with the construction of a new museum and archives for the City of Trail.
- To identify objectives and strategies to prepare action plans for museum exhibit design, fundraising for exhibit construction, a new organizational structure for the management of the new museum and archives, and the overall management of THS affairs.

#### THE PLAN WILL INCLUDE:

- An evaluation of current THS successes, what constraints it faces, and how they may be effectively addressed in the future.
- A review of the vision, mission statement and values, and operating principles contained in the 2007-2012 Strategic Plan and offer recommendations for amendment where necessary.
- A review of THS goals and objectives contained in the 2007-2012 Strategic Plan and offer recommendations for amendment where necessary.

- A review of current roles of the Board and governance of the THS and offer recommendations for the future functions of the Board and its individual members.
- A proposed strategy for the THS to raise the funds necessary to create the exhibits for the new museum.
- Establish goals and objectives for the operation and management of the new museum and archives.
- Establish goals and objectives for the management of the Sports Hall of Memories.

### SCOPE OF WORK

1. Review and analyze existing background material pertinent to the study.
2. Organize and facilitate meetings with the Board of the Trail Historical Society (7 members), THS staff, and others as required to prepare the Strategic Plan.
3. Prepare a draft Plan that meets the Plan objectives and present the draft to the Board. One (1) bound copy and one (1) unbound copy of the draft Plan will be required for distribution.
4. Revise the draft Plan based on feedback from the review process by the Board and staff and prepare a final Plan for THS use. Two (2) bound copies and one (1) unbound copy of the Plan will be required for distribution. The final Plan will also be submitted in a digital PDF file.

### PROPOSAL CONTENTS

Should you wish to submit a proposal, we request the following:

1. That the proposal clearly outline the method and approach to be used in preparing the Strategic Plan.
2. That the proposal specify the consulting team members and the general qualifications of each member, including a summary of the experience with similar projects.
3. That the proposal include a schedule of fees and disbursements and the maximum overall cost for the preparation of the Strategic Plan.
4. The proposed timetable for completion of the Strategic Plan.

### SELECTION PROCESS

The THS will take into consideration such matters as it considers appropriate in selecting the consultant including proposed methodology, experience and qualifications of the consultant, fees and disbursements, schedule and reference checks.

## GENERAL INSTRUCTIONS

1. Proposals will be accepted until 4:00 p.m. on February 27, 2015 at the offices of the Trail Historical Society located at 1394 Pine Avenue, Trail BC, V1R 4E6.
2. The THS reserves the right to accept or reject any or all proposals and to accept the proposal it deems most advantageous to the THS.
3. The THS will not be responsible for the costs of preparing proposals.
4. The successful consultant will be authorized to proceed only upon approval of the Board of the Trail Historical Society.

## INQUIRIES

Inquiries during the proposal period should be directed to:

Jamie Forbes, President  
Trail Historical Society  
Phone: 250-368-9932  
Email: [jfforbes@telus.net](mailto:jfforbes@telus.net)