Call for Proposals: Project Consultants - Technology

Project: State and Territorial Archive Data Aggregation Implementation Grant
Organization: Council of State Archivists (CoSA)
Location: Remote, U.S. Based
Engagement Duration (expected): 2 phases, each 24 months with possibility of overlap
Total funding available for both phases: $150,000

CoSA seeks proposals from practicing consultants or small teams to support the recently funded Mellon Foundation grant to support an implementation effort to activate recommendations that advance the stewardship and use of data related to state and territorial archives, alongside strategic planning for organizational sustainability and maintenance. Major goals for the overall project include finalization of adoption of an Association Management System (AMS) and new website; migration of CoSA's Resource Center to GitHub or similar environment; creation and configuration of a dynamic data repository with visualization features; and implementation of a plan for continuous improvement and sustainability of the tools in the future.

The technology components of the project were proposed in two phases: design/implementation (Phase 1, 2026-2027) and maintenance/sustainability (Phase 2, 2027-2028). CoSA welcomes proposals that address one or both components and expects those selected to work in tandem for some portion of the project term for long-term success.

- [Phase 1: Technical Design and Implementation](#)
- [Phase 2: Technical Maintenance](#)

Interested consultants should contact CoSA Executive Director Joy Banks at employment@statearchivists.org for further details and information on submitting a proposal. Review of proposals will begin by early February 2026.

Call for Proposals: Project Consultants-Technical Design and Implementation

Project: State and Territorial Archive Data Aggregation Implementation Grant
Organization: Council of State Archivists (CoSA)
Location: Remote, U.S. Based
Engagement Duration (expected): 24 months
Total funding available: $100,000

CoSA seeks proposals from practicing consultants or small teams to support the recently funded Mellon Foundation grant to support an implementation effort to activate recommendations that advance the stewardship and use of data related to state and territorial archives, alongside strategic planning for organizational sustainability and maintenance. Major goals for the overall project include finalization of adoption of an Association Management System (AMS) and new website; migration of CoSA's Resource Center to GitHub or similar environment; creation and configuration of a dynamic data repository with visualization features; and implementation of a plan for continuous improvement and sustainability of the tools in the future.

Project Background Specific to this Call:
During the previously funded planning grant (2023-2025), project consultants from AVP provided a proof of concept to show the possibilities and labor of drawing CoSA's current and historic data into a more dynamic visual environment, specifically through Tableau Public. Additionally, previous consultants created a mock-up of the CoSA Resource Center in a GitHub repository, expanding the possibilities of that long-standing CoSA product to include a more dynamic collection of resources. In December 2024, CoSA migrated association management to GrowthZone, which also provides a hosted website built on WordPress. Development and optimization of the AMS and website continue so that our community's needs are met. The Design and Implementation Consultant will develop these concepts and recommendations into usable products.

Scope of Work:
Resource Center
CoSA's Resource Center is intended to be a community-accessible hub for digital resources, workflows, guidelines, standards, and other content sourced from across the community and around the world. Though the Resource Center has existed in many forms, current needs dictate creation of a new more flexible solution. It should feature:

- Individual, linkable pages for a wide variety of resources in a variety of formats (documents, A/V, data sets, coding, etc.)
- Customizable metadata for each resource to facilitate search and discovery, and tracking/communication of which community members contributed to, or use certain resources in their work

- A taxonomy for resources that is built off digital preservation standards and best practices, and which is intuitive for the community
- Integration with the features of CoSA's website and GrowthZone Community spaces
- The site should have the ability to gather analytics on usage

Data Visualization

CoSA seeks the creation of an online repository for data in multiple format**s**

- Create and configure a data repository for data collected by CoSA and community partners and stakeholders
- Data repository should be web-accessible and developed on a commercial platform with data visualization and analytics tools available (e.g. PowerBI) to manipulate and create data products for the community
- Data repository must be designed with the functionality to accept new submissions, track longitudinal data, and contextualize (through comments, notes, or other features) the provenance and relevance of the data
- Recommend strategies for efficient and accurate data collection and export using existing tools and methods (e.g., GrowthZone Forms, Sogolytics, SurveyMonkey, etc.)
- Create standardized workflows to transform disparate data sources (e.g. datasets from CoSA, SAA, Census Bureau, IMLS, etc.) into a standardized format enabling comparative analysis
- Export of data into structured datasets, graphs and other visualizations, for export and distribution. Standard exports for specific products are essential.

Work Products

- Interim reports and presentations as needed
- Implementation of the Resource Center and Data Visualization tools
- Final report and presentation with recommendations for maintenance

CoSA expects project work to begin in early 2026 and continue through early 2028. Individuals or teams may submit proposals for consideration, which should include an expected timeline of project work. The maximum payable amount is $100,000.

Required Qualifications:

- Demonstrated experience with data visualization tools like Tableau Public, including the ability to create interactive dashboards and data visual environments.
- Strong project management skills with a track record of managing complex projects from inception to completion, preferably in a nonprofit or academic setting.
- Proficiency in web development and design, including experience with search engine optimization (SEO) and user experience (UX) design.
- Familiarity with content management systems (CMS) and/or association management systems (AMS) and experience in optimizing websites to new platforms.
- Experience in data management, including cleaning and linking data sets, and developing data maps.
- Experience with using GitHub or similar platforms for hosting and managing resources.
- Strong written and oral communication skills, including the ability to create clear, concise documentation for users to understand and utilize new tools and resources.

- Ability to engage with a diverse range of stakeholders, including Board members, retirees, active volunteers, corporate sponsors, mission-aligned associations, and external partners.
- Experience in stakeholder engagement, including conducting focus groups and surveys.
- Familiarity with archives, government agencies, or other related fields (such as libraries, museums, or records management)
- Eligible to work in the U.S.
- Ability to travel to an in-person gathering (*funding available*)

The Council of State Archivists (CoSA) is a nonprofit membership organization of the state and territorial government archives in the fifty states, five territories, and District of Columbia. Through collaborative research, education, and advocacy, CoSA provides leadership that strengthens and supports state and territorial archives in their work to preserve and provide access to government records. For more information, visit https://www.statearchivists.org/. **CoSA is an Equal Opportunity Employer.**

Call for Proposals: Project Consultants-Technical Maintenance

Project: State and Territorial Archive Data Aggregation Implementation Grant
Organization: Council of State Archivists (CoSA)
Location: Remote, U.S. Based
Engagement Duration (expected): 24 months
Total funding available: $50,000

CoSA seeks proposals from practicing consultants or small teams to support the recently funded Mellon Foundation grant to support an implementation effort to activate recommendations that advance the stewardship and use of data related to state and territorial archives, alongside strategic planning for organizational sustainability and maintenance. Joining the project mid-way, the Technology Maintenance Consultant will work alongside CoSA's Program Manager and volunteers to ensure the continued success and sustainability of this project's initiatives and outcomes.

Project Background Specific to this Call:
Following initiation of CoSA's new Resource Center and dynamic data hub, Phase 2 of the project will shift to a focus on maintenance and sustainability. The primary responsibilities will include assisting staff during the grant timeline and integrating maintenance tasks into existing staff positions for long-term sustainability.

Key Responsibilities:
Website Maintenance:
1. **Content Updates:** Establish a system for regular content updates and maintenance to ensure the website remains current and relevant.
2. **SEO Strategies:** Confirm search engine optimization (SEO) strategies to increase website visibility and accessibility.
3. **Data Management:** Develop a data map to consolidate and define which elements are appropriate to include in the AMS (Association Management System).

Resource Center Maintenance:
1. **User Feedback System:** Implement a system for collecting and incorporating user feedback to continuously improve the Resource Center.
2. **Maintenance Schedule:** Establish a regular maintenance schedule to ensure the Resource Center remains up-to-date and functional.
3. **Resource Integration:** Finalize the migration of existing resources, taxonomy for resource description, and architecture of the site.

Data Visualization Tools Maintenance:

1. **Tool Updates:** Regularly review and update the data visualization tools based on user feedback and technological advancements.
2. **Version Control:** Implement a plan for managing version control and updates.
3. **User Documentation:** Create documentation for users to understand and use the tools effectively.
4. **Outreach and Training:** Conduct outreach initiatives and training sessions to introduce the tools to CoSA and the research community and encourage their use.

Policy and Community Building:
1. **Best Practices:** Develop a plan to capture and disseminate best practices, research findings, and success stories for inclusion in the Resource Center.
2. **Survey Integration:** Integrate data from a forthcoming iteration of a reimagined Archives and Records Management (ARM) Survey (likely in 2026) and establish a path for integrating future data into Phase 1 tools.
3. **Assessment Mechanisms:** Incorporate assessment of the Resource Center and Data Visualization Tool into existing mechanisms, such as the annual Calls to the Members.
4. **Communication and Training Plan:** Alongside CoSA staff, establish a plan for regular communication and training on the tools to encourage engagement and contributions.

Work Products
- Interim reports and presentations as needed
- Documentation for relevant systems
- Final report and presentation with recommendations for maintenance

CoSA expects project work to begin in early 2026; however, this phase of work will start later in 2027 with work continuing through the end of 2028. Individuals or teams may submit proposals for consideration, which should include an expected timeline of project work. The maximum payable amount is $50,000.

Required Qualifications:

- Strong written and oral communication skills, including the ability to create clear, concise documentation for users to understand and utilize new tools and resources.
- Proven experience in developing training materials and providing instruction to diverse audiences.
- Proven experience in website maintenance, content management, and data visualization tools
- Proficiency in cloud-based systems, data management, and version control.
- Experience in collecting and integrating user feedback to improve tools and resources.
- Strong project management skills with the ability to work independently and as part of a team.
- Experience in community building and engagement, particularly within nonprofit or archival organizations.
- Familiarity with content management systems (CMS) and/or association management systems (AMS) and experience in optimizing websites to new platforms.
- Ability to engage with a diverse range of stakeholders, including Board members, retirees, active volunteers, corporate sponsors, mission-aligned associations, and external partners.
- Familiarity with archives, government agencies, or other related fields (such as libraries,

museums, or records management)
- Eligible to work in the U.S.

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