

# Rotary Charities of Traverse City

## History & Legacy Research Consultant

### Scope of Work

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### Background

Rotary Charities of Traverse City is preparing for its 50th anniversary (2026–2027). This milestone provides an opportunity to reflect on the organization’s history, evolution, and learning over five decades, while laying a thoughtful foundation for future-facing storytelling.

As part of the anniversary effort, Rotary Charities will produce:

- A legacy-focused 2026 Annual Report (*Looking Back, Lessons That Guide Us*)
- A history and legacy video
- A future-focused 2027 Annual Report (*Learning Forward, Together*)
- A 50th anniversary website landing page and related engagement activities

To support this work, Rotary Charities seeks a **History & Legacy Research Consultant** to document, synthesize, and interpret the organization’s historical record. This role is intentionally focused on research, learning, and sense-making, not on producing final public-facing narratives.

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### Purpose of the Role

The History & Legacy Research Consultant will provide a rigorous, well-organized research foundation that supports anniversary storytelling across formats. The consultant’s work will capture institutional memory, surface patterns and lessons across time, and equip Rotary Charities staff and creative partners with shared understanding to guide content development.

This role centers learning as a core part of Rotary Charities’ legacy and is designed to inform, not prescribe, anniversary narratives.

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# Scope of Work

## 1. Historical Research and Review

The consultant will review and synthesize existing historical materials, which may include:

- Past annual reports and publications
- Internal governance or planning documents (as appropriate)
- Grantmaking records and program summaries
- Prior storytelling assets and archival materials
- External references to Rotary Charities' work

The consultant will focus on identifying:

- Major milestones and inflection points
  - Patterns in how Rotary Charities has evolved over time
  - Recurring challenges, adaptations, and learning moments
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## 2. Coordinated Stakeholder Interviews

The consultant will participate in stakeholder interviews conducted **in coordination with Rotary Charities staff and a videographer.**

Rotary Charities staff will manage interview scheduling and logistics. The consultant's role is focused on preparation, participation, and documentation of interviews rather than interview coordination.

Responsibilities include:

- Collaborating with Rotary Charities staff to develop interview questions aligned with anniversary themes and research goals
- Participating in approximately **20 stakeholder interviews** alongside the videographer
- Documenting interviews through written summaries that capture key themes, insights, and contextual notes
- Flagging notable quotes, ideas, and moments of emphasis for future reference

Interviews will be recorded by the videographer, and Rotary Charities anticipates using AI-based transcription tools. The consultant may also record interviews separately, if helpful, for documentation purposes. Interview documentation is summary-based and intended for internal and creative use, supporting both research synthesis and video production.

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### 3. Synthesis and Interpretation

The consultant will synthesize findings from historical materials and interviews into clear, usable research outputs that support anniversary planning and storytelling.

This work emphasizes interpretation and pattern recognition rather than narrative writing.

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## Deliverables

### 1. Historical Source Inventory

An annotated inventory of historical materials reviewed, noting time period, relevance, and key insights.

### 2. Stakeholder Interview Documentation

Written summaries of stakeholder interviews, capturing themes, insights, and contextual notes relevant to Rotary Charities' evolution.

### 3. Historical Timeline

A synthesized timeline highlighting major milestones, decisions, and inflection points in Rotary Charities' history, with emphasis on learning, change, and impact.

### 4. Thematic Synthesis Memos

The consultant will produce **two to four** internal-facing thematic synthesis memos that integrate findings across documents and interviews to surface recurring themes, lessons, and patterns in Rotary Charities' development over time.

Rotary Charities will provide an example thematic synthesis memo to illustrate the format, tone, and level of synthesis expected.

These memos serve as interpretive guides to inform anniversary communications, including video production, annual report writing, and website content.

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## Collaboration and Communication

The consultant will work closely with Rotary Charities staff throughout the engagement, sharing findings iteratively and incorporating feedback as understanding develops. Rotary Charities will provide onboarding materials, contextual background, and access to staff knowledge to support alignment with organizational values and anniversary framing.

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## Timeline (Estimated)

The overall timeline for this engagement is flexible, with several key anchor points tied to anniversary deliverables.

- Project kickoff: Early 2026
- Historical research and coordinated interviews: Approximately 8–12 weeks following kickoff
- Synthesis and documentation: Approximately 4–6 weeks following completion of interviews

### Key anchor points:

- The 2026 Annual Report (*Looking Back, Lessons That Guide Us*) is expected to be published in **October 2026**, and research synthesis should be completed during **mid-summer 2026** to support writing, design, and production ahead of publication.
- The history and legacy video may be released at any point between **October 2026 and October 2027**, allowing flexibility in how research insights continue to inform video development over time.

The consultant should anticipate continued availability for light consultation or clarification, as needed, to support anniversary deliverables within this broader window.

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## Desired Qualifications

- Experience in qualitative research, oral history, or organizational history
  - Strong interviewing, listening, and synthesis skills
  - Ability to interpret complex information and surface meaningful patterns
  - Familiarity with community-based or philanthropic organizations preferred
  - Comfort working collaboratively with staff and creative partners
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## Proposal Expectations

Interested consultants should submit a proposal that includes the following:

- **Approach and methodology:** A brief description of how the consultant would approach historical research, coordinated interviews, and synthesis for an organizational anniversary project of this nature.
- **Relevant experience:** Examples of past work related to qualitative research, organizational history, oral history, or similar learning-focused engagements.
- **Proposed work plan and timeline:** A high-level outline of anticipated phases of work aligned with the timeline and anchor points described above.

- **Deliverables and level of effort:** Confirmation of the deliverables included in the proposal and an estimated level of effort or hours associated with each phase.
- **Fee structure:** A proposed budget or fee range for the scope described.
- **Availability:** Anticipated availability during 2026 and into 2027, as relevant to the anniversary timeline.

Rotary Charities welcomes proposals from individual consultants or teams and encourages clarity about roles if multiple contributors are involved.

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## What Success Looks Like

A successful engagement will result in:

- A well-documented and organized historical record that is accessible to staff and creative partners
- Clear synthesis of patterns, lessons, and learning across Rotary Charities' history
- Thematic synthesis memos that provide shared understanding and guide anniversary storytelling without prescribing narrative or voice
- Clear, well-organized documentation of stakeholder interviews that supports multiple campaign deliverables
- A collaborative working relationship marked by curiosity, thoughtfulness, and respect for multiple perspectives

Success will be reflected in how effectively the research enables Rotary Charities' communications team and creative partners to develop accurate, meaningful, and aligned anniversary content.

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## How to Respond

Interested consultants are invited to submit a brief response via email to **Miriam Owsley** at [mowsley@rotarycharities.org](mailto:mowsley@rotarycharities.org) that addresses the following:

- **Approach and experience:** A short description of relevant experience and how you would approach this scope of work
- **Proposed scope:** Confirmation of which components of the scope you are responding to (including whether proposing as an individual or team)
- **Proposed fee:** A project-based fee for the scope described
- **Assumptions:** Any key assumptions that inform your pricing or approach
- **Availability:** Confirmation of availability across the anticipated project timeline

Responses should be concise and focused on fit, approach, and collaboration style.

**Responses are requested by March 13.** Following initial review, Rotary Charities will schedule conversations with selected respondents in **late March** to further assess fit and working approach.

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## Notes on Scope

This scope is intentionally focused on research and learning. Deliverables are designed as internal tools to inform anniversary storytelling, not as publication-ready narratives. Additional roles, including writing and video production, may be scoped separately.