

REQUEST FOR PROPOSALS (RFP) for STRATEGIC PLANNING SERVICES

Victoria Symphony Society (VSS)

VSS is requesting proposals from interested, qualified, and experienced professional strategic planning firms or individuals to provide strategic planning and facilitation services. A Request for Proposals (RFP), which includes instructions for its completion, is attached.

Respondents to this RFP shall submit completed proposals in PDF format via email with the subject line "Proposal for Strategic Planning Services" to administration@victoriasymphony.ca no later than **Friday, Dec 4, 2020 at 4pm** Pacific Standard Time.

Questions regarding this solicitation can be directed to Emily Boon at emily@victoriasymphony.ca

The final date to submit questions is Friday Nov 20, at 4pm Pacific Standard Time.

RFP Schedule*

RFP Issued: Friday, November 6, 2020

Final Date for Questions Related to RFP: Friday, November 20, 2020

Proposal Deadline: Friday, December 4, 2020

Proposals Reviewed/Evaluated by Selection Committee: Friday, December 11, 2020

Applicant Interviews as Requested of Finalists: Dec 14-18, 2020

Selection Committee Recommendation and Board Approval of Contract: Monday, December 21, 2020

Contract Executed: Wednesday, December 23, 2020

Submittal Instructions

Written proposals and an electronic PDF must be received by VSS no later than **Friday December 4, 2020**. Proposals received after this deadline will not be accepted or considered.

Request for Proposals for Strategic Planning Services Victoria Symphony Society

INTRODUCTION

VSS is seeking proposals from consultants/firms to guide the organization with the development of a new strategic plan. The anticipated Period of Performance will include a 3-month period to provide adequate time for participation by the Strategic Planning Committee (SPC), the VSS Board, in addition to input and review by key community stakeholders. Additional or fewer Period of Performance requirements are at the discretion of VSS.

The primary deliverable of this contract and process will be a written organizational strategic plan document that presents the planning process, research, analysis, opportunities and strategies along with an implementation plan that will guide VSS activity for the next three years.

This RFP requests professional services of a consultant to facilitate the strategic planning process.

Based on the proposals received, the SPC (comprised of VSS staff, musicians and Board members) will select individuals/firms to be interviewed. As a result of those interviews, the top-rated consultant will be selected by the SPC for contract negotiations.

VSS shall determine the most responsive and responsible consultant providing the best service at the most reasonable cost. Cost alone shall not be the determinative factor. VSS reserves the right in its absolute discretion to make no award or contract.

BACKGROUND

The Board of Directors of VSS is interested in building on the organization's current strategic plan, set to expire at the end of 2020, to build a new three year strategic plan for the 2021-2024 time horizon.

VSS is the only major professional orchestra on Vancouver Island and presents symphonic repertoire to over 130,000 people annually while providing employment opportunities for more than 44 professional musicians.

VSS's current mission is, **"to enrich lives through the shared experience of extraordinary music."** We are proud to hold creativity, innovation and artistic excellence as core values that help to strengthen our community culturally, educationally and economically. Our current Strategic Plan speaks to four strategic pillars: build a financial plan for sustainability; broaden, deepen and diversify our audience; raise the artistic standards and profile of the Victoria Symphony; and build our reach into the community.

More organizational background can be found on our website at www.victoriasymphony.ca

VSS Board, Management and Staff:

The VSS Board of Directors is comprised of 14 members and is primarily focused on strategic issues, governance and fundraising. It normally meets 8 times a year, approves and monitors the annual budget and financial reports, and works alongside the CEO and senior administrative staff to determine and oversee organizational strategy. Currently there are 12 elected members plus two orchestra representatives on the Board. Board members serve an initial three-year term (with opportunity for a

second three year term) and bring diverse experience and expertise to the organization including financial, legal, business, governance and human resources.

There is a full time staff of 12.

GENERAL SCOPE OF SERVICE REQUIRED

The proposal will address how your firm will plan, structure, and execute the strategic planning process from start to finish, addressing in particular:

Approach to Strategic Planning

- Identify your firm's general approach to assisting clients in the development of a strategic plan.
- Describe the strategic planning model that would be applied to this project, including its general structure and terminology.
- Identify reasons why such a strategic plan is valuable to the client, including what benefits and advantages may be achieved by the client organization.

Project Structure and Process Management:

- Describe the strategic planning process and methodologies to be applied by your firm that will lead the client through a well-planned and well-managed process / set of steps leading from the first step through to a final approved strategic plan.
- Describe the relationship between your firm and the client to exist throughout this project process; clarify your firm's role and responsibilities versus the client's role and responsibilities.
- Describe an estimated timeline for each step of the process, and the overall process.
- Describe the staffing of a strategic planning process, including a preliminary identification of who (by generic description) should be involved in each step, including definition of the key direct stakeholders by nature/position.
- Describe the elements of a final approved strategic plan. Describe what it will look like when finalized. Describe the key take-aways that the client will have at the conclusion of the process.

Engagement of other stakeholders

- Describe the approach to defining and identifying key direct stakeholders as well as other stakeholders.
- Describe the process for engaging other stakeholders in the process such that their input is sought, considered, and appropriately woven onto the development of the strategic plan.
- Describe how your firm's approach to the strategic planning process will maximize comprehension of all relevant issues and encourage buy-in and commitment to the final approved plan on the part of all key direct stakeholders (as identified) and all other stakeholders (as identified).
- Describe how your firm's approach, the process and the final approved plan can be integrated into the public image that the client can project to the public community it seeks to serve.

GENERAL PROJECT MANAGEMENT

- The Consultant will work with the SPC to develop and finalize the strategic planning process; validate VSS objectives for this project; and outline SPC, Board, staff, and consultant roles and responsibilities for the project.
- The Consultant will suggest techniques/strategies for soliciting stakeholder feedback and involvement in the process.
- The Consultant will develop a work plan to guide project activities and communications.
- The Consultant will conduct an orientation and multiple briefing sessions for the Board and key stakeholders on project goals and the potential outcomes.
- The Consultant must be available for presentations to the Board, including but not limited to a presentation of the final version of the strategic plan developed through this project.

ELIGIBILITY

Each applicant shall specifically identify in its proposal whether or not any potential or actual Organizational and Consultant Conflicts of Interest (OCCI) exists for this procurement. If the applicant believes that no OCCI exists, the OCCI response shall set forth sufficient details to support such a position. Applicants shall submit with their proposal an OCCI certification, using the following language:

“The applicant [] is [] is not aware of any information bearing on the existence of any potential organizational conflict of interest. If the applicant is aware of information bearing on whether a potential conflict may exist, the applicant shall provide a disclosure statement and mitigation plan describing this information.”

Prospective firms or entities are not eligible to submit a proposal if current or past corporate and/or other interests may—in the opinion of VSS—give rise to conflict of interest in connection with this RFP or the Services. Firms/individuals are to submit with their proposal documents a description of any issue that may constitute a direct or indirect conflict of interest for review by VSS. VSS’s decision on this matter will be final.

FACILITIES

The primary place of performance shall be at the Consultant’s facility, which must be within the Capital Regional District (CRD) local commuting area, or at an approved alternate location if deemed in the best interest of contract performance. The Consultant shall attend meetings and perform various tasks at VSS virtually or in person (COVID policies in place), during the period of performance of the task order. Local travel expenses of Consultant personnel will not be the responsibility of VSS, including parking. VSS is not required to provide workspace, facilities, or hardware to the contractor at their off-site location. VSS staff will provide space for meeting with Consultant personnel as directed by VSS. VSS staff will work with the Consultant in arranging meetings with functional management.

CONTRACTOR TRAVEL

If travel is required, the Consultant shall notify VSS and obtain approval prior to Consultant personnel traveling. Consultant shall submit a cost estimate to VSS for approval prior to commencement of any travel. For approved travel, direct travel costs will be reimbursed for actual cost incurred.

PROPOSAL SUBMISSION REQUIREMENTS

Each applicant shall be responsible for preparing an effective, clear, and concise proposal. It is recommended that proposals contain the following information:

- A cover letter introducing the company and/or individual and the individual who will be the primary contact person.
- Proposed statement of work, project approach and plan to accomplish the work. Describe in detail your firm’s project approach and methodology in managing and implementing a project of this size and scope and experience in developing and supporting the implementation of a comprehensive strategic plan.
- A statement that the consultant is registered to conduct business in British Columbia.
- Specific qualifications regarding experience in strategic planning services, including the names of clients doing similar work as the VSS or in the artistic, or culture events field. A reference list should be attached to the proposal, with client names, contact persons, and phone numbers.
- A detailed timeline for completion of each phase and the total project. The VSS is interested in pursuing this strategic plan in as expeditious a manner as possible.
- A description of the firm’s organization and staff’s qualifications.
- A description of 2-3 projects of a similar scope, magnitude and complexity to the work described in this solicitation.
- A pricing narrative with a proposed fee schedule for each phase of the project including any incidental or travel fee estimates.
- The signature of an authorized individual to bind the firm. The proposal must be a firm offer for a 60-day period.

SELECTION PROCESS

Each of the proposals received will be evaluated and determined if it meets the stated requirements. Failure to meet these requirements will be a cause for eliminating the consultant from further consideration. Initial evaluation of the proposals will be made by VSS’s Strategic Planning Committee. In addition to evaluating written proposals, in-person interviews (or virtual) may be requested.

VSS shall not be liable in any way for any costs arising incurred by any consultant in the preparation of its proposal in response to this RFP or any losses or damages arising from VSS’s rejection of any proposal for any reason whatsoever.

Proposals will be evaluated on the following criteria:

Technical Proposal and Project Approach – 35%		35 Total Points
Credentials/Experience - 35%		35 Total Points
Cost Proposal – 30%		30 Total Points
TOTAL		100 Points

PROPOSAL REVIEW AND AWARD SCHEDULE

All deadlines are by 4:00 p.m. PST of the stated date. Written proposals and an electronic PDF must be received by VSS no later than 4PM PST on Friday, December 4, 2020. Proposals received after this deadline will not be accepted or considered. The selection committee shall make a recommendation to VSS Board of Directors, who will retain final approval of contract. Work may begin immediately following contract execution with the finalist.

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