

INTIMAN

THEATRE

“Look to the Future” Strategic Planning Process Request for Proposal

1. OVERVIEW

1.1 INTRODUCTION

Intiman Theatre (Intiman) is seeking proposals from qualified strategic planning firms or contractors (Vendor) to run a comprehensive community engaged strategic planning process in 2020 to define the future of the company, our position in the community, and to outline the space needs of the theatre and a sustainable path forward.

1.2 BACKGROUND INFORMATION ON INTIMAN

Intiman is a professional theatre company located in Seattle, Washington, who won the 2006 Tony Award for Outstanding Regional Theatre, the 2018 Gregory Award for Outstanding Musical, 2018 Teeny Award, a 2019 Mayor’s Arts Award, and is overseen by Artistic Director Jennifer Zeyl, interim management from the arts consulting firm Scandiuuzzi Krebs, and Board President Daniel Nye. The company retired a historical \$2.7m in debt & obligations in 2018, and remains debt-free. The theatre’s mission is to wrestle with American inequities.

Intiman has a passion for social justice, and strives towards liberation through artistic activism. The company looks at inequities plaguing our country and talks about these injustices in theatrical productions, works through these injustices in educational programs, and evaluates internal policies within community to fight against institutional injustices.

Since its founding in 1972, Intiman has presented over 240 productions to Seattle audiences. Among the more recent of these are HIR by Taylor Mac, THE EVENTS by David Grieg, ANGELS IN AMERICA by Tony Kushner, TROUBLE IN MIND and WEDDING BAND by Alice Childress, BOOTYCANDY and BARBECUE by Robert O’hara, BULRUSHER by Eisa Davis, and DRAGON LADY by Sara Porkalob.

Intiman Theatre does not currently have a home theatre.

In future, Intiman envisions itself as a hub for community, where art making of all kinds happens and important conversations are ignited. A place where audiences of all ages and backgrounds gather to watch a show, new works are incubated, and where bridges are built between communities.

Key Personnel that will work on the strategic planning project include board member Elizabeth Coplan, Artistic Director Jennifer Zeyl, Development & Communications Director Wesley Frugé, and Interim Managing Director Josef Krebs, among others.

1.3 PROJECT OBJECTIVE

Create a map forward for the theatre that meets the needs of, and has buy-in from the communities we serve. The plan will be sustainable, flexible, accessible for all, equitable, and will answer the space needs of the theatre. It will identify strategies and objectives for our future programming, facilities, leadership and staffing models, and community engagement.

1.4 PROJECT SCOPE

The strategic planning project will include:

- Assessment of current activities and staffing models
- Stakeholder interviews
- Review of financials, tech platforms, and data

It will NOT include:

- Designing a new theatre
- Programming future seasons
- Decision making on casting, community partners, etc.

1.5 PROJECT SCHEDULE

The strategic plan should be finalized by August 31, 2020.

If the Vendor is proposing a timeline that extends past this deadline, provide your reasoning why, and how the additional time will provide benefit to Intiman.

1.6 ORGANIZATION OF THIS RFP

The layout of this RFP is as follows:

- 1 Overview
- 2 Instructions to Proposers
- 3 Evaluation Process
- 4 Evaluation Criteria
- 5 Statement of Work
- 6 Vendor References
- 7 Vendor Qualifications
- 8 Itemization of Proposed Costs

2. INSTRUCTIONS TO PROPOSERS

2.1 SCHEDULE AND SUBMITTING A PROPOSAL

To be eligible for consideration, all proposals must be submitted via email to josef@intiman.org by January 3, 2020.

Intiman will only accept one proposal from each Vendor.

2.2 CLARIFICATION OF REQUEST

Communications with Intiman will be accepted via email only, to josef@intiman.org. Questions must be submitted by December 27, 2019.

2.3 COST OF PREPARATION OF RESPONSE

Expenses incurred in preparing and presenting a proposal to Intiman are the sole responsibility of the Vendor and may not be charged to Intiman in any way.

2.4 CANCELLATION

Intiman reserves the right to cancel the procurement process at any time.

2.5 REJECTION OF PROPOSALS

Intiman reserves the right to reject any and all proposals.

2.6 CLARIFICATION OF RESPONSES

Intiman reserves the right to contact any Vendor to clarify their proposal.

2.7 CHANGES TO STATEMENT OF WORK

Intiman reserves the right to change the statement of work included in this RFP

2.8 REQUIREMENTS NOT IN THE BEST INTEREST OF THE INTIMAN

Intiman reserves the right to select and reject any portion of a Vendor's proposal.

2.9 INTERPRETATION OF PROPOSALS

Intiman reserves the right to interpret all proposals in its best interest.

2.10 REFERENCES

Intiman reserves the right to check references other than those provided by proposing Vendors.

2.11 PUBLICITY

Intiman is responsible for all the publicity about this procurement process and any matters associated with procuring, planning, and executing the strategic plan. At no time shall a Vendor create or participate in any publicity related to this project without prior written permission from Intiman.

3. EVALUATION PROCESS

3.1 PHASE ONE) Proposal Meets Mandatory Minimum Requirements

All Vendors must meet the following mandatory minimum requirements:

- Knowledge of the Seattle area theatre and arts non-profit ecosystem. (Yes / No)

- Understanding of racial equity and social justice work. (Yes / No)
- Experience running a strategic planning process for another non-profit arts organization. (Yes / No)

3.2 PHASE TWO) Proposal Evaluation

Intiman will evaluate proposals meeting the mandatory minimum requirements and select at least two finalists based on their evaluation score, including costs.

3.3 PHASE THREE) Interviews

Intiman will interview finalists in person or via video conference. The Vendor with the highest score during this interview will proceed to the next evaluation phase.

3.4 PHASE FOUR) Reference Checks

Intiman will conduct reference checks with previously prepared questions and ask follow-up questions, as needed. The finalist passes or fails the reference check evaluation phase. If they fail, Intiman will conduct reference checks on the next highest scoring finalist.

4. EVALUATION CRITERIA

Intiman will evaluate proposals, assigning weighted scores to the following categories:

- Vendor qualifications, capabilities and resources 20%
- Proposed personnel qualifications 20%
- Statement of Work 40%
- Requirements 10%
- Cost 10%

Intiman reserves the right to adjust these criteria at any time.

5. STATEMENT OF WORK

Intimate is seeking a Vendor who will complete the following during the strategic planning project:

- **Project Management Plan** – A description of the project hierarchy, roles and responsibilities, and reporting relationships for key individuals and entities within the project. It should also describe mechanisms for communication, risk, budget, schedule and change management throughout the project lifecycle.
- **Project Work Plan** – The sequence of tasks and deliverables to complete the project.
- **Project Schedule** – The sequence and timing of tasks, deliverables, required resource assignments and critical path to complete this project.
- **Project Progress Reports** – Regular cadence of reporting on project status and issues, budget and schedule.
- **Project Deliverable** – Draft Strategic plan submitted for review and recommended changes for compliance with Deliverable Acceptance Criteria (DAC). Final deliverable submitted in compliance with DAC, accepted and paid by Intiman

6. VENDOR REFERENCES

Intiman will contact three Vendor references. This includes three named references (with contact name, title, telephone number and email address) submitted by the Vendor demonstrating prior experience providing similar services requested in the RFP. Intiman may consider other references other than those supplied by the Vendor.

7. VENDOR QUALIFICATIONS

Intiman is seeking a Vendor with experience and/or expertise in the following areas:

- The Seattle-area, PNW, and national non-profit theatre landscape.
- Radical hospitality, and other such accessibility programs.
- Racial equity and social justice work.
- Strategic planning for a regional theatre, museum, or other \$1M+ non-profit organization.
- Community engagement, including gathering and synthesizing feedback.
- Survey creation and analysis

8. ITEMIZATION OF PROPOSED COSTS

Proposing Vendors must clearly define each fee for the tasks related to this RFP, including proposed staff and their hours to complete the final deliverable. Intiman will not reimburse for any other Vendor costs. Fees for all activities related to this strategic planning process are not to exceed \$25,000.

Intiman will only make final payment upon acceptance of the Vendor's final version of the Strategic Plan deliverable. The deliverable must meet the following DAC:

- Be reflective of and have buy-in from the communities Intiman serves
- Map out a sustainable plan forward, for a minimum of 5 years, including rough estimate budgets
- Answer the space needs of the theatre
- Use a lens of racial equity and social justice for all areas of the plan
- Provide staffing and leadership structures
- Allow for flexibility as the needs of the community change
- Include accessibility as a core value