



Request for Proposal: Strategic Planning

Proposals due: Friday, August 18, 2017

About ACSO

The Association of California Symphony Orchestras (ACSO) was founded in 1969 by a small group of committed orchestra managers who believed in the power of local networking. Almost 50 years later, ACSO remains the hub of California's vibrant classical music community by providing a variety of services to its members including networking, mentorship, resource sharing, advocacy, and professional development.

The organization experienced a major leadership change in 2016. The former executive director of thirty-one years, retired, and after a national search, a new executive director was hired, who relocated from out of state. When the new executive director came on board, he moved the offices from Sacramento to Los Angeles.

Currently, ACSO serves 180 individual dues paying members and 120 organizational members spanning across the state and region: 48 in northern California, 14 in the central region of the state, 50 in southern California, and eight out of state (including business members). With individual members, orchestra staff members, board members, and musicians, the association serves 2,000+ people.

Project Description

ACSO has begun the process to draft a new strategic plan. The ACSO Board and Staff have already completed Phase 1 of a three-phase strategic planning project. This RFP is to employ services to lead the organization through Phase 2 and 3 over a six-month time period.

Phase 1 (completed March – August 2017): Setting a Framework

Board discussion to outline vision and goals for strategic planning process (see Core Objectives section below). Board committee formed and project timeline established.

Phase 2 (September – December 2017): Data Gathering & Analysis

Gain a better understanding of the current needs of our members – or potential members – through quantitative and qualitative research. Quantitative data gathering through member-wide survey, engaging all stakeholders (see Target Audiences & Stakeholders section below). Qualitative data gathering through statewide “listening tour,” i.e. professional development workshops with a facilitator-led discussion forum component.

Phase 3 (December 2017 – January 2018): Strategizing & Detailed Planning

Findings and themes from data presented to committee. Full board discussion and planning at January convening. Plan to be finalized by committee by March 1 for presentation to the full board at the March board meeting.

Project Team

ACSO Staff

Mitch Menchaca, Executive Director

Board Committee

Aubrey Bergauer, Executive Director, California Symphony (co-chair)

Lacey Huszcza, Senior Director of Advancement & Strategic Engagement, Los Angeles Chamber Orchestra (co-chair)

Genevieve Macias, Director of Development & Communications, Long Beach Symphony

Alan Mason, Managing Director, BlackRock and Board Member at Santa Rosa Symphony

Dean McVay, Partner, Lewis Brisbois and Board Member at San Bernardino Symphony

Adrienne Valencia, Director of Youth Education, San Diego Symphony

Dorothy Wise, Executive Director, Santa Cruz Symphony

ACSO Full Board

Meeting in January 2018, see timeline below

Core Objectives

During Phase 1 of this three-phase process, the ACSO board and staff identified the following core objectives for Phase 2 and Phase 3 as we work to develop a new strategic plan:

1. Understand the current needs of our members and prospective members in order to better serve and ultimately grow our membership.
2. Continue working to ACSO's strengths of being a vital network in the industry and providing rich learning opportunities.
3. Explore broadening who we serve geographically (e.g. Western States service area) and/or broadening constituent focus (e.g. better serving future leaders through talent development for the field, better serving orchestra volunteers, better serving musicians, better helping organizations - especially smaller ones - have greater success, helping members do more around engaging the community and building audiences).
4. Identify steps/actions to enable ACSO to be a top leader in the field nationally (e.g. thought leadership with current issues and trends, a model service organization for inclusivity and diversity), while remembering that organizations with different budget sizes have different needs and should be addressed differently.
5. Review the mission and vision of the organization.
6. Produce a 3-year strategic plan with actionable timeline, viable financial model, and measurable metrics and objectives.

Target Audiences & Stakeholders

Organizational Members – ACSO serves professional and community orchestras, youth orchestras, and festivals of all budget sizes. Nearly 70% of ACSO’s earned income comes through affiliation with professional orchestras, with 9% each from youth organizations and (professional) festivals, followed by community organizations at 6%, with the rest of earned revenue being divided throughout chamber, league/guilds, choruses, etc. 89% of all professional orchestras, and 50% of youth orchestras in the state of CA are members.

Individual Members – ACSO serves individuals serving the performing arts industry in all roles: staff, board, musicians, volunteers, artist managers, service providers/vendors. This is an area for potential growth for ACSO; however, we recognize a current challenge in defining the value proposition for individual members (i.e. why join when an individual receives benefits via their organization’s membership).

Funders – ACSO receives support from individual donors, government and foundation funders; bringing these groups along in the planning process in some way is essential in order to use this process as a relationship touchpoint and to make the case for future funding.

Proposed Project Timeline

Phase 2

August 7 – RFP distributed

August 18 – Proposals received

September 1 – Consultant contracted

September 21 – Consultant call with planning committee to review survey questions + review Discussion Forum (i.e. statewide “Listening Tour”) questions + discussion of ACSO assets

September 22 – Membership survey questions finalized

September 25 week – Membership survey built

October 1- November 19 – Membership Survey deployed + Professional Development & Discussion Forums (i.e. statewide “Listening Tour”) take place at 10 locations throughout California

October 12 – Consultant call with planning committee to give preliminary report from Discussion Forums and surveys

November 19 – Membership survey closes and statewide Discussion Forums complete

Phase 3

December 1 – Summary reports due from Consultant for survey data and for discussion forums with noted common themes

December 7 – Consultant call with planning committee to review summary reports, findings, themes

January 11 – Consultant call with planning committee to review/revise strategy and approach for January full board meeting discussion

January 22 – Consultant attends full Board meeting in Monterey. Presentation of qualitative and quantitative research findings to full board + Consultant-led full board discussion of:

- Problems/opportunities to better serve our membership as identified through the fall qualitative and quantitative research.
- Solution(s) we currently provide, could provide, or will choose not to provide (either outside organizational scope or means, or another org could/would provide).
- Activities – new or existing based on solutions – that are the actual work ACSO does and could do, the activities we conduct, services we provide, and any products we could distribute or sell.
- Outcomes & Impacts – the changes we hope to produce with our solutions and activities at the individual level and the regional/state/community/org level.
- Value Claim – a statement of who we are, what we do, and why we do it, noting this somehow needs to be different for individuals vs. orgs as differentiating this has been a key challenge
- Budget – high level discussion around any potential revenue from existing or proposed activities, products, services, as well as any expenses – particularly time required (FTE or hours) for those existing or proposed activities, products, services.

January 29 – Final report due from Consultant including recommendations on external activities to implement and any internal operational changes. Planning committee then works with ACSO staff and other board committees in February to develop budgets/forecasts for desired activities, eliminate any activities that prove unviable, and create final proposed plan and work timeline for presentation at March board meeting.

Project Budget

The ACSO Board would like for this project to cost \$8,000 - \$15,000. This budget will cover all activities described herein to be led by Consultant, including qualitative and quantitative research, travel for leading statewide discussion forums, conference calls with committee, summary reports, and travel and time to lead full board discussion at January meeting.

Proposals must include an estimate for all work in the proposal, as well as hourly and daily rates; and must include estimated costs of travel to locations around the state for listening sessions and focus groups, and meeting with ACSO board and staff. We anticipate that the strategic planning process will include travel for up to ten meetings across California and up to three board meetings in San Francisco, Monterey, and Los Angeles. Proposals should also factor in time for multiple conference calls and/or Skype sessions with the ACSO Strategic Planning Committee throughout the process.

Proposal Deliverables, Requirements, and Guidelines

Deliverables & Requirements

- Develop survey for membership and key stakeholders
- Attendance at and facilitation of all ten (10) statewide discussion forums
- Participation in planning committee conference calls as outlined herein

- Summary report from survey research with findings and trends
- Summary report from discussion forums with findings and trends
- Attendance at January ACSO full board meeting, leading action plan discussion
- Final report with recommendations for key actions, outcomes, and metrics to be included in ACSO's new strategic plan.

Guidelines

In your proposal, please include:

- 3-4 references of clients with which you have done similar work to our project (other nonprofit arts or member service organizations preferable)
- A company profile and list your core competencies
- Any additional vendor relationships you are proposing as part of this proposal
- Detailed, line item budget
- Description of your plan to achieve the goals and scope of work outlined herein

Send Proposals To:

Mitch Menchaca
Executive Director
mmenchaca@acso.org

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