



**REQUEST FOR PROPOSALS (RFP)
FOR
ESPRIT ORCHESTRA'S DIGITAL STRATEGY**

Issue Date: June 3, 2019

Submission Deadline: July 4, 2019, 5:00pm EST

Dear Proposer:

Proposals must be received no later than **5:00 pm, on Thursday, July 4, 2019 EST**. All proposals must be submitted in the following two formats:

1. Two copies in a sealed envelope and have "DIGITAL STRATEGY PROPOSAL, RFP RESPONSE" clearly marked on the outer most mailing envelope.

Mail to:

Esprit Orchestra
511 - 174 Spadina Avenue
Toronto, Ontario M5T 2C2

2. Emailed electronically in one PDF document, to:

rachelloo@espritorchestra.com

Proposals will not be accepted after the date and time stated above. Incomplete packages that do not conform to the requirements specified herein will not be considered.

Thank you for your interest in working with Esprit Orchestra on this project. We look forward to receiving your response.

Sincerely,

Rachel Loo
Operations Manager



**REQUEST FOR PROPOSALS (RFP)
FOR
ESPRIT ORCHESTRA'S DIGITAL STRATEGY**

Primary Contact:

Rachel Loo
Operations Manager
Email: rachelloo@espritorchestra.com
Phone: 416-815-7887

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1. OPPORTUNITY

Esprit Orchestra is looking to understand its current digital state, identify its digital needs and consider what its digital future could include. Funding for this project is provided by the Canada Council Digital Strategy Fund, Special Initiative Grant. To fulfill the funding requirements, Esprit Orchestra is looking to partner with a consultant, consultancy, or agency to conduct a three-phase process that will develop our digital vision, guiding principles, priorities, and an action plan that fits our capacity, and available resources.

2. ABOUT US

Esprit Orchestra is Canada's only full-sized, professional orchestra devoted to performing and promoting new orchestral music.

Founded in 1983 by Music Director and Conductor, Alex Pauk, Esprit's commitment to commissioning and advancing contemporary music has set it apart as one of the few organizations of its kind on a global scale. Esprit regularly collaborates with outstanding Canadian and international composers and performs with first-class soloists and ensembles from Canada and abroad.

Each concert season, Esprit Orchestra commissions, promotes and performs the work of Canadian composers, and features Canadian premieres of music by leading international composers. With a dynamic annual subscription concert series, this skilled 65-member orchestra presents music that is otherwise unavailable in Canada. The music is always performed to the highest standards in the acoustically acclaimed Koerner Hall at the TELUS Centre for Performance and Learning in Toronto, Canada.

In addition to its commitment to new music, one of Esprit's core initiatives is to cultivate the next generation of new music professionals and audiences through mentorship and outreach programs. Each year, Esprit engages with schools and organizations to provide free educational experiences including lectures, open rehearsals, and mentorship opportunities in both composition and orchestral performance.

Esprit has been the recipient of multiple prestigious awards, including three Lieutenant Governor's Arts Awards, the Jean A. Chalmers National Music Award, the Vida Peene Award and the SOCAN Award for Imaginative Orchestral Programming. Esprit aims to continue this trajectory of excellence as the organization proudly undertakes its fourth decade of operations.

Esprit is a non-profit charitable organization governed by a volunteer Board of Directors.

Artistic Leadership

Alex Pauk Founding Music Director & Conductor

Board of Directors

Margaret Logan President
Daniel Zbacnik Treasurer
Kathy Li Secretary
Alexina Louie Director at Large
Cedric Franklin Director at Large
John Kelly Director at Large

Administration

Rachel Loo Operations Manager
Amber Melhado Marketing & Outreach Coordinator

3. PROJECT BACKGROUND

The majority of Esprit's current activities and services are not delivered digitally. Notwithstanding that, Esprit's current digital activities include video content with our *Musical Mind* series with composer and artist interviews, social media presence on Facebook, Twitter, Instagram, YouTube, LinkedIn, and our recent website rebrand. In 2019, Esprit partnered with Ludwig Van Toronto to produce a video series of composer Q&A mini-segments.

We believe that we can do much more and that there is an opportunity to identify and launch digital activities that will allow us to share our offerings (i.e. concerts, education programs, lectures, and recordings) with a broader audience. As a result, Esprit's Board of Directors, artistic leadership and administrative staff have identified the need to prioritize the improvement of the organization's digital programming and operations.

We recognize that our organization is in a unique position, being the only professional Canadian orchestra devoted to performing and promoting contemporary orchestral music, and that as a result we are faced with unique challenges. By completing this project, we hope to gain new perspectives and ideas to help overcome what we currently see as our biggest challenges: reaching new audiences and markets and engaging the public in new digital ways. We seek to increase our understanding of the organization's current digital readiness, identify what our digital needs are and create a strategic plan for how to move forward digitally so that Esprit Orchestra can evolve and remain Canada's leader in contemporary orchestral music.

While acknowledging our organization's strengths (e.g. strong mandate, unique position, sophistication), we also recognize that we have weaknesses such as limited staff capacity and digital distribution limitations that prevent the organization from evolving. Our aim is to expand our audiences by providing deeper and more meaningful

opportunities for audience engagement, create an effective digital footprint to build on Esprit's legacy, and promote the enjoyment of this truly remarkable repertoire of modern Canadian classical music. Through the process, we hope to gain knowledge and expertise in digital, prioritize where to make digital investments, and identify digital goals that would best support our organization's priorities. Ultimately, we believe that a thorough digital understanding and plan are essential for the organization to grow in today's increasingly digital environment.

We aim to embrace, learn from and adapt to the changing digital environment.

4. PROJECT REQUIREMENTS

Within the context of Esprit's corporate goals, current and future programs, and our operations, the projects three phases are as follows:

1. Digital Maturity Assessment:
 - a. Evaluate our current use of digital tools and programs to meet our audience's needs including identifying current strengths and areas needing improvement. Sample questions:
 - i. How "digital" is Esprit Orchestra?
 - ii. What does Esprit do well digitally?
 - iii. Where can Esprit make improvements digitally?
2. Digital Needs Assessment
 - a. Identify digital goals for Esprit and identify the gaps between the current state and where we need to invest. Sample questions:
 - i. What "infrastructure", actions and programs should Esprit prioritize when it comes to the use of digital tools?
 - ii. How digital should Esprit be (vis-à-vis other means by which Esprit fulfils its corporate mission)?
 - iii. How does Esprit benefit from improving our digital skills?
3. Digital Strategic Plan
 - a. Deliver a plan that outlines Esprit's digital goals and how to achieve them, with key sections:
 - i. Vision, Guiding Principles, Priorities, Action Plan

The project's three phases should build on one another. While proponents are free to recommend specific project activities to meet the project goals, we see project activities potentially including an audit of our current digital approaches, environmental scans, focus groups, stakeholder meetings, interviews with staff and Board members, and surveys of our audience and the public. We will work with the selected consultant to finalize the reporting processes, project plan, timeline and deliverables.

Project Timeline

Each phase is dependant on completion of the previous phase. Project must be completed by May 31, 2020.

PHASE	DATE
1 – Digital Maturity Assessment	August –October 2019 (3 months)
2 – Digital Needs Assessment	November 2019 – January 2020 (3 months)
3 – Digital Strategic Plan	February – May 2020 (4 months)

5. RFP REQUIREMENTS

1. Letter of Introduction
 - a. Provide a summary of why you or the agency is a good fit with Esprit Orchestra.
2. About You
 - a. Tell us about yourself or the agency.
 - b. Outline your relevant experience.
 - c. Outline your services and how they will benefit Esprit Orchestra.
 - d. Biography/ies and resumes of applicable team members.
3. Examples of Relevant Experience
 - a. Provide examples and case studies of previous relevant work.
4. Budget Breakdown
 - a. Referring to the Schedule of Fees (section 6 below), breakdown the project budget. Please state fees, disbursements and HST separately.
5. Knowledge of Industry and Organization
 - a. Demonstrate understanding of organization’s operations and artistic mission, as well as Arts sector as a whole .
6. Work Plan and Approach
 - a. Describe your proposed work plan, deliverables, working style and approach.

Questions about the RFP

Proponents may submit questions via email only to the Primary Contact. All questions and answers will be provided to all proponents.

Request for Proposal Schedule

TASK	DATE
Issue of Request for Proposal	Monday, June 3, 2019
Expression of Interest Deadline	Friday, June 14, 2019
Receipt of proponent questions deadline	Friday, June 21, 2019, 5:00pm EST
Response to proponent questions	Friday, June 28, 2019
RFP Closing Deadline	Thursday, July 4, 2019, 5:00pm EST
Notification of shortlisted proponents	July 8-12, 2019
Interviews with shortlisted proponents	July 15-19, 2019
Notification of selected	Tuesday, July 23, 2019

6. SCHEDULE OF FEES

The project budget is fixed at CD\$39,000. All quoted budget fees must include incidentals (travel, accommodation, printing, telephone, etc.) but exclude HST.

Please provide a proposed payment schedule. We will provide a 10% project advance at the signing of the project contract. Your proposed fee payment schedule for the remainder of the budget should reflect the key actions and deliverables of your proposed work plan.

Esprit will provide a separate allowance for meeting-related expenses such as room rentals and refreshments. Do not include these costs in your budget.

7. EVALUATION

Scoring of proposals

Criteria	Percentage
Experience & Qualifications	30%
Work Plan & Approach	30%
Industry & Organization Knowledge	20%
Project Understanding	15%
Budget	5%
TOTAL POINTS	100%

Interviews

We will meet with up to three proponents to discuss their proposals.



Digital Maturity Assessment

What is it?

A *Digital Maturity Assessment*:

- Helps you measure your current use of digital
- Identifies your digital strengths and areas for improvement

What are the benefits?

- You can see a snapshot of **where you use digital**
- You can understand **how you use digital**
- You can learn about **areas you might want improve digitally**

If you ask these questions:









- How digital is my organization?
- What is my organization doing well with digital?
- Where can we make improvements in digital?

Start with a Digital Maturity Assessment!

What should it assess?

- It measures how your organization performs in key digital areas.
- It often looks at 8 main categories of digital use (see table below).
- You might focus on a few specific categories or add others, depending on what's important for your organization.

Key Digital Categories

 Vision	The goals you have for the digital future of your organization
 Activities and Services	How you use digital to perform activities or deliver services to your target audience
 Target Audience	How you use digital to get information about your target audience (the groups of individuals that you serve), their digital expectations, preferences, and behaviours
 Engagement	How you use digital channels to reach out to your target audience
 Development	How you build digital activities and services to suit your target audience's needs
 Technology	How you currently use technology for processes and activities, and the type of technology you use
 People and Organization	How you enable your people to use digital tools and encourage new technology in your organization
 Security	How you protect your digital information with clear processes that you update regularly

Digital Maturity Assessment: EXAMPLE

Have a look at the example assessment below. It measures a fictional organization’s maturity level across 8 digital categories.

Things to think about before you read through:

- You don’t need to be at an advanced level for every category! You can choose which categories you want to focus on.
- Where you focus your time and effort depends on the goals of your organization.

Digital Maturity Level

Legend
Where you are today

● **To discover**
Skill not yet developed

● **Preliminary**
Skill under development

● **Moderate**
Skill developed

● **Advanced**
Skill fully developed

Vision 	Preliminary: <i>Digital vision somewhat developed; strategic plan refers to digital, but not as a priority</i>	△		
Activities and Services 	Moderate: <i>Activities and services are often delivered digitally</i>		△	
Target Audience 	To Discover: <i>Data is not collected on the target audience</i>	△		
Engagement 	Preliminary: <i>Engagement is heavily paper-based and generalized across audiences (i.e., not customized)</i>		△	
Development 	Preliminary: <i>The voice of the audience is sometimes considered when developing or changing activities and services</i>	△		
Technology 	Moderate: <i>Processes and delivery often use technology; advanced technology is sometimes used</i>		△	
People and Organization 	Advanced: <i>Employees excellent with digital tools; new technology is always encouraged in the organization</i>			△
Security 	To Discover: <i>Processes are somewhat in place to protect information</i>	△		

What comes next?

Once you’ve worked with a consultant to develop your Digital Maturity Assessment:

- You have a better idea of your organization’s current state using digital.
- Take the time to consider the categories where you can do better in digital and how that will help to advance the priorities of your organization – these may be investments worth making.

- Think about a [Digital Needs Assessment](#) next – this will help you figure out your goals for the future of digital in your organization.



Digital Needs Assessment

What is it?

A *Digital Needs Assessment*:

- Helps you identify where you want to be with your digital skills
- Shows you the gap between your current and desired digital skills (and where you might want to invest)

What are the benefits?

- You can **see the opportunities** for your organization
- You can **identify the digital skills** that will help your organization deliver results
- You can start to **identify your digital goals**

What should it assess?








- It will measure the gap between where you are today digitally and where you want to be.
- It often looks at 8 main categories of digital use (see table below).
- You might focus on specific categories or add categories, depending on what's important for your organization.

If you ask these questions:

- What *should I prioritize* when it comes to digital?
- How *digital* should my organization be?
- How can my organization *benefit* by improving digital skills?

Start with a Digital Needs Assessment!

Key Digital Categories

 Vision	The goals you have for the digital future of your organization
 Activities and Services	How you use digital to perform activities or deliver services to your target audience
 Target Audience	How you use digital to get information about your target audience (the groups of individuals that you serve)- their digital expectations, preferences, and behaviours
 Engagement	How you use digital channels to reach out to your target audience
 Development	How you build digital activities and services to suit your target audience's needs
 Technology	How you currently use technology for processes and activities, and the type of technology you use
 People and Organization	How you enable your people to use digital tools and encourage new technology in your organization



Security

How you protect your digital information with clear processes that you update

Digital Needs Assessment: EXAMPLE

The example below measures a fictional organization's needs across 8 possible categories.

For each category, there are four maturity levels where an organization can be: *To Discover*, *Preliminary*, *Moderate*, and *Advanced*.

You don't need to be advanced in every category. You may choose which categories are important to your organization.

Legend

- △ Where you are today
- ▲ Your goal for the future
- The gap

Digital Maturity Level

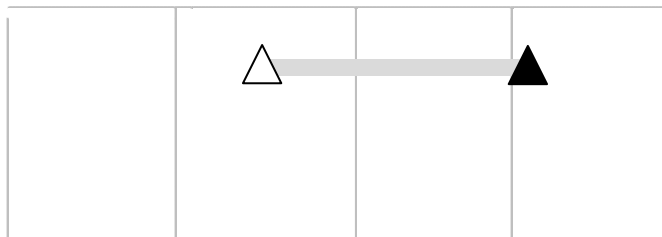
- **To discover**
Skill not yet developed
- **Preliminary**
Skill under development
- **Moderate**
Skill developed
- **Advanced**
Skill fully developed

Current State

Future Goal

Vision

Preliminary:
Digital vision somewhat developed; *strategic plan* refers to digital, but not as a priority



Advanced:
Digital vision is clearly outlined; *strategic plan* outlines how digital plays an important role

Activities and Services

Moderate:
Activities and services are often delivered digitally



Advanced:
Activities and services are nearly always delivered digitally

Target Audience

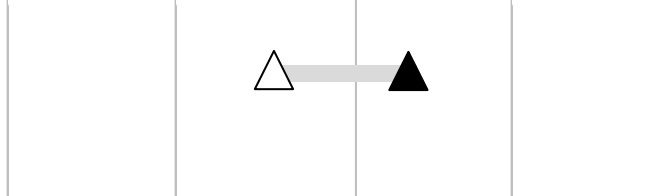
To Discover:
Data is not collected on the target audience



Moderate:
Data is captured on the target audience

Engagement

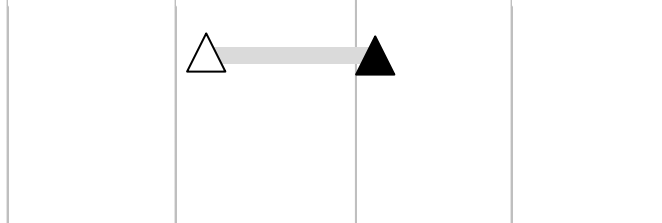
Preliminary:
Engagement is heavily paper-based and generalized across audiences



Moderate:
Engagement is often using digital channels and often tailored to different audiences

Development

Preliminary:
The voice of the audience is sometimes considered when developing activities and services



Moderate:
The voice of the audience is often considered when developing or changing activities and services

Technology

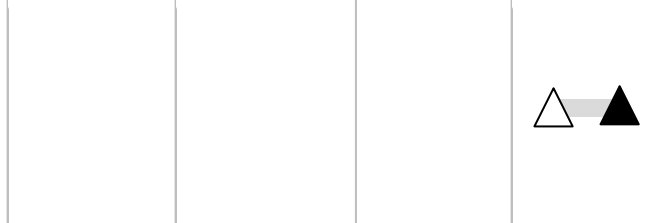
Moderate:
Processes and delivery often use technology; *advanced technology* is sometimes used



Moderate:
Processes and delivery often use technology; *advanced technology* is sometimes used

People and Organization

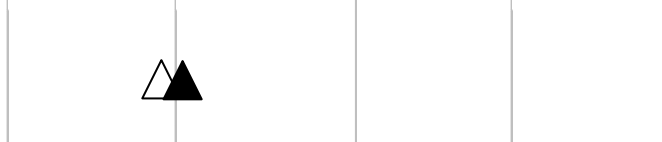
Advanced:
Employees excellent with digital tools; *new technology* is always encouraged in the organization



Advanced:
Employees advanced with all digital tools; *new technology* is always encouraged

Security

To Discover:
Processes are not in place to protect data or information



Preliminary:
Processes are somewhat in place to protect information

The consultant can help you understand what your future state might be.
Together, you may consider your *capacity*, *resources available*, the *benefits*
and the *cost* in order to set your goals.

What comes next?

When you work with a consultant to develop your Digital Needs Assessment:

- You'll have a better idea of where you want to be in the future when it comes to digital!
- Think about your digital needs: How big is the distance from where you are to where you want to be? What factors influence where you set your goals?
- Now that you understand where your digital gaps exist, you can prioritize opportunities for the future and create a plan – think about a [Digital Strategy](#) next.



Digital Strategy

What is it?

A *Digital Strategy* is:

- A plan that outlines your digital goals and how you will achieve them
- A living, evolving document
- A document to help you make choices for your organization

A *Digital Strategy* is not:

- A rigid document that stays the same over time
- A marketing, web, or social media strategy
- A series of goals with no plan to achieve them

If you ask these questions:

- How can I *achieve my digital goals*?
- Where should I be *focusing my digital efforts*?
- What do I need to do to *get started*?

Consider developing a Digital Strategy!

What are the benefits?

- You can identify **where you want to be**, and **how to get started**.
- You can better **meet your goals** by knowing your priorities and plan.
- You can make informed decisions on how to **build a stronger organization**.

What should it cover?

- Anything covered in your digital strategy should align with the ultimate mission of your organization. It should improve what you already do.
- It will typically cover: vision, guiding principles, priorities, and action plan (see table below).

Vision					
How you want to use digital to support 'what you aspire to be' as an organization					
Guiding Principles					
The beliefs and values that guide your decision-making when it comes to your digital vision					
Priorities					
The goals you have for digital – what you want to focus on within your organization.					
<i>Consider these six dimensions when you are thinking about your priorities.</i>					
Activities and Services	Audience	Channels	People	Process	Technology
The way you use digital to deliver activities and services	The groups of individuals that you serve	The digital platforms used to deliver your services	Your employees, who help to deliver and manage digital	The policies and procedures that help to enable digital	The underlying technology within your organization

Action Plan

The steps you will take to achieve your priorities for each of the six dimensions in Priorities

Digital Strategy: EXAMPLE

Your Digital Strategy builds on your Digital Maturity and Needs Assessments. It helps you prioritize your digital goals and allows you to create a plan to achieve them.

Have a look at the example strategy below. Remember that **you** are in control of your strategy. You make the choices and decide what your priorities are. Work closely with your consultant to ensure that your strategy is a useful tool for your organization.

Example organization: Small local art gallery

Vision

Facilitate the sharing of artistic works of local artists with the general public, by using digital in a way that best supports visitor learning and engagement.

Guiding Principles

Community-centric: We care about the needs and preferences of each visitor.

Empowering: Our employees and local artists have the tools and training they need to share artworks with the public.

Accessibility: Services are accessible and will work for everyone.

Priorities

Activities and Services	Audience	Channels	People	Process	Technology
Develop new digital activities and services	Customize the experience of our visitors at our gallery	Use digital channels to improve how we promote local artists	Encourage our staff and local artists to think digital-first	Measure and understand the benefits of using digital	Use digital to deliver a better overall experience for our visitors

Action Plan

Activities and Services	Audience	Channels	People	Process	Technology
Develop programming that is delivered online for those who can't be in the gallery	Divide our audience into different groups, based on their preferences, needs, and behaviours	Create a gallery on our website where visitors can see current exhibitions	Give rewards to employees who think of new ways to use digital	Actively track and record results of digital, and analyze results	Make a digital reservation system for our visitors to schedule their visits for events

What comes next?

Once you've worked with a consultant to develop your Digital Strategy:

- You've now outlined your priorities and have a plan to achieve them.
- As you put together your plan to achieve your goals (and as you begin to execute that plan), *you should consider*: your **capacity**, **resources available**, **benefits** and **costs**.
- Your next step is to start applying the steps outlined in your action plan.