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REQUEST FOR PROPOSAL FOR STRATEGIC CONSULTING SERVICES

Submission Deadline: Monday, April 8, 2024 at 5:00 pm MDT

Contact: Rebecca Zahn, Board of Directors - Vice Chair, Sled Island Arts Fellowship

Email: chair@sledisland.com

Phone: 403-630-3101

Website: www.sledisland.com

RFP Issued: Wednesday, March 13, 2024

Deadline to Express Intent to Submit: Monday, March 25, 2024, at 5:00 pm MDT

Deadline for Questions or Clarifications: Wednesday, March 27, 2024, at 5:00 pm MDT

Submission Deadline: Monday, April 8, 2024, at 5:00 pm MDT

Evaluation & Interviews: Tuesday, April 9, 2024 - Monday, April 15, 2024

Contract Start Date: Thursday, April 25, 2024

OVERVIEW / BACKGROUND

Mission: Sled Island Arts Fellowship presents a thoughtfully curated and discovery-focused annual multi-venue festival plus additional year-round programming that strengthens Calgary's arts community, elevating under-represented and independent music and artists while ensuring accessible, barrier-free cultural experiences for our audiences.

Vision: Sled Island is a window into the best of what Calgary could be. We are recognized as a catalyst in the Calgary arts community, providing a platform for artists to reach audiences they otherwise would not and providing audiences with unforgettable experiences. Sled Island fills a critical gap in the community, embedding anti-racism, diversity, and equity principles into our work. We enable artists and audiences to be accepted for who they are.

Since 2007, Sled Island's thoughtful, eclectic programming and independent spirit have produced a one-of-a-kind festival experience. Each June, the five-day music and arts festival offers a curated selection of 200+ bands,

comedy acts, film, and art, as well as panels and workshops geared towards the professional development of emerging musicians. The festival gathers over 30,000 attendees across 15+ venues, earning rave reviews from a dedicated fanbase, artists, and media across the globe. Unique to Sled Island is the guest curator model, which offers a festival headliner the opportunity to perform and hand-select some of the acts. Sled Island is a non-profit, charitable organization; in addition to the main June festival, the organization operates year-round, hosting a number of smaller events in the winter months with 4 full-time employees and seasonal hires for the festival.

Sled Island's mandate is to expose the public to music and art that is not disseminated by the mass media and to expand appreciation for various artistic expressions. The notion of discovery is intrinsic to our artistic vision and a pillar around which we articulate our programming. Sled Island provides an essential platform for Calgary audiences to access cutting-edge, socially conscious music and arts while exposing local artists to inspiring and daring creators from across the globe. Our artistic vision aims to fight cultural homogenization through thoughtful programming that celebrates plurality and encourages discovery.

Sled Island's current strategy is cemented in the organization's mission and vision and has been formalized through numerous public commitments to values of anti-racism, inclusion, and accessibility. This EDIA-focused work, which began in 2020 and was implemented in the 2022-2025 Strategy, has had a highly positive impact internally and in the wider community, allowing us to adopt new ways of thinking and doing to make the festival more inclusive and reflective of all communities.

With 2024 festival plans well underway, we must look ahead to future festival seasons - and year-round opportunities - and consider how our organization's mission and model can evolve to become more financially sustainable. With that, Sled Island seeks a consultant or consulting firm to help us measure where we are today, explore what trends and best practices are leading the live entertainment/arts industry, and analyze Sled Island's readiness to implement new strategies that are meaningful to our audience and beneficial to our community.

ABOUT THE ROLE

Sled Island seeks to evaluate our current festival model and explore organizational transformation. The Strategic Planning Consultant ("Consultant") will help Sled Island answer key questions: *how can we test the relevance of our mission, explore new programming opportunities, and discover new ways to engage our audience and community with the ultimate goal of increasing long-term financial sustainability?*

Leveraging their successful experience in the arts and live entertainment sector and in organizational change implementation, the Consultant will deliver an analysis of current programming and engagement activities, reflect on key elements to retain, create a market analysis and trends report on live entertainment/festivals, and ideate new revenue strategies while considering next steps that will support us on our journey to greater financial sustainability and longevity.

The Consultant will work closely with Sled Island's Board of Directors' Strategic Planning Committee and Executive Director, engaging the wider Board at key milestones. In the later stages of the Strategic work, the Consultant will provide ad-hoc support to staff and the Board as required and agreed upon by the Consultant.

Continuing existing organizational strategies, the Consultant will consider how reconciliation, equity, diversity, inclusion, and accessibility (EDIA) can be integrated into new programming and models.

SCOPE OF WORK & REPORTING REQUIREMENTS

The below-staged approach is preliminary and estimated and could be reviewed by Sled Island based on the progress of the work and recommendations of the Consultant. The Consultant acknowledges having fully reviewed and assessed this RFP Scope of Work and deliverables and is committed to perform within such not to exceed budget, all deliverables and actions necessary, directly or indirectly, to achieve the objectives of this RFP.

Phase 1: Assessment

April 25, 2024 - May 25, 2024 (1 month)

This phase seeks an unbiased assessment of the organization's current and future position. This assessment will be based on current and historical organizational data and metrics and include insights from Stakeholder engagement.

The assessment should also cover Sled Island's ability to absorb change under the current organizational structure, including succession planning, and identify the strengths, weaknesses, opportunities and threats surrounding our current artistic offering and festival model.

With this foundational assessment, the key deliverable will be to provide an Assessment Report to enable Sled Island to understand the scope and potential of our organization's evolution in adopting best practices and exploring new trends within the North American live entertainment and arts sector. The Consultant will also outline existing programs which are critical to maintain. During this Assessment phase, the Consultant shall, without limitation:

- Engage with the Sled Island Board's Strategic Planning Committee, Executive Director, and Staff to review the existing model and collect relevant data/metrics for Analysis
- Conduct a series of virtual **Stakeholder Interviews** to support model review, including but not limited to staff, board, venues, artists, funders, and audience members.
- **Progress Report** via e-mail at 2 weeks to update Strategic Planning Committee and Executive Director on work to date
- Meet virtually with the Strategic Planning Committee and Executive Director to review **Organizational Assessment Report** and **Trends Report on Music & Arts Festivals in North America** to ensure alignment before launching Phase 2

Due to Festival demands, the Executive Director and Staff will be unavailable during June. Therefore, activities requiring staff engagement should be outside of this period.

Phase 2: Strategy Development

June 15, 2024 - Sept 15, 2024 (3 months)

The key deliverable for the Consultant will be a thorough, justified and detailed report with concrete, actionable recommendations that explore potential roadmaps for addressing Sled Island's key problem statement: increasing long-term financial sustainability through new programming and engagement strategies.

Strategy work will be data-informed, grounded in continued stakeholder engagement, and committed to principles of equity, diversity, inclusion, and accessibility. The Consultant will leverage their expertise in the arts and live entertainment sector to explore innovative programming approaches while considering the resources required to execute new strategies and attract new audiences. This will be accomplished through forecasting models that pair recommendations with revenue potential.

In-person participation at the Sled Island Arts & Music Festival, June 19 - 23, 2024, in Calgary, Alberta, is highly suggested. Sled Island will provide complimentary tickets/passes, but travel and accommodations will be secured at the Consultant's own cost.

- **Progress Report** via e-mail every 2 weeks to update Strategic Planning Committee and Executive Director on work to date, allowing the opportunity for feedback.
- **Monthly Meetings** (virtual) with Strategic Planning Committee to discuss progress with opportunity to refine approach, as required.
- **Virtual Meeting** with the Board of Directors and Executive Director to present and discuss **Proposed Festival Models** and other **Final Documents** for Board approval (first week of September).

Due to Festival demands, the Executive Director and Staff will be unavailable during June. Therefore, activities requiring staff engagement should be outside of this period.

A month-long break will occur between the end of Phase 2 and the start of Phase 3 for evaluation and approval.

Phase 3: Implementation Roadmap

Oct 15, 2024 - November 15, 2024 (1 month)

The key deliverable for the Consultant is a complete, detailed, and justified multi-year implementation roadmap that focuses on translating strategy into actionable plans alongside corresponding key metrics of success. Elements of the plan are to be rolled out in the 2025 Sled Island strategy and fully realized at Sled Island 2026 and subsequent years.

- **Progress Report** via email at 2 weeks to update Strategic Planning Committee and Executive Director on work to date, allowing the opportunity for feedback
- Virtual Meeting with the Strategic Planning Committee at 3 weeks to discuss work to date, allowing the opportunity for feedback
- **Virtual Meeting** with the Board of Directors and Executive Director to end of phase to present and discuss **Implementation Road Map** and other **Final Documents** for Board approval
- Management & staff work to implement and engage the Consultant **as required**

Reporting and scope of work are not fully defined. Proposing organizations are encouraged to provide suggestions and proposed methodologies. Flexibility in adapting to refined project requirements is appreciated based on findings and directions explored in prior phases.

Phase 4: Sled Island Implementation Phase

Ongoing Support for Change Management TBD

December 1, 2024 - September 25, 2025

Phase 4 of Sled Island's Strategic Change Period will be focused on implementation and led by Staff. Proposing organizations answering the RFP do not need to provide suggestions, proposed methodologies, or budgets for this phase but are encouraged to consider what they could offer for long-term ad-hoc engagement.

PROJECT GOALS AND DELIVERABLES

Phase 1: Assessment

The primary goal for Phase 1 is to perform an evaluation of Sled Island's current and future positioning, utilizing organizational data along with insights from Stakeholder engagement. The assessment will examine Sled Island's adaptability to change within the existing organizational structure, identify critical elements of the current model which should be retained, and, upon successful completion, will reflect the Consultant's deep understanding of Sled Island's current place in the community and wider live entertainment and festival industry.

- A. **Organizational Assessment Report:** Examine our ability to absorb change under the current organizational structure, including elements of succession planning, and identify the strengths, weaknesses, opportunities and threats surrounding our current artistic offering and model. With this foundational assessment, we can understand the scope and potential of our organization's evolution. Insights from Stakeholder Engagement will be used to validate these findings and ensure a wide range of perspectives are considered.
- B. **Trends Report on Music & Arts Festivals in North America;** this trends report will cover all areas of festival programming and operations - including non-profit and for-profit models, indoor-multi-venue and outdoor single-site operations, and a range of artistic offerings - including but not limited to cutting-edge music programming, music-centered film programming, and visual art. It should consider how these trends translate into revenue generation and examine how ticketing strategy, partnerships, individual donations, and sponsorable properties are positioned alongside audience-focused activities.

Phase 2: Strategy Development

The primary goal for Phase 2 is to explore implementing a new festival strategy that ensures the festival's long-term financial sustainability. This involves utilizing industry expertise to craft innovative solutions grounded in data analysis, stakeholder engagement, and EDIA principles.

- A. **Two Unique Festival Models:** Consider the ways in which Sled Island can diversify income streams, increase public and private funding, attract increased individual donations, grow and maintain our audience, and improve operational and sponsorship partnership development. These plans should reflect both new and existing programming and reflect stakeholder insights and industry trends from Phase 1. Plans are expected to outline local venue and site selection strategy, consider potential festival dates and year-round initiatives, partnerships, ticket pricing, and brand positioning. The following areas, while not

exhaustive, are to be considered when developing these models:

- **Brand Relevance**
 - Does this new model align with the interests, needs, and values of the evolving consumer and ideal target audience?
- **Audience & New Reach**
 - How does this new model impact our current audience? What new audience or communities will this new model attract?
- **Sustainability & Scalability**
 - Are the models viable in the long term, and do they have the potential to grow and evolve over time?
- **Brand Positioning**
 - How do the models position Sled Island Island locally, nationally, and in the broader industry context?
- **Technology & Innovation**
 - Consider how technology and innovation can be leveraged to enhance the effectiveness and efficiency of the proposed models. Explore digital solutions and emerging trends that could drive innovation within the organization and programming experience.
- **Resource Requirements**
 - What resources are required to implement this new model, and what investments will be required to see planned returns?
- **EDIA Principals**
 - How can Sled Island incorporate equity, diversity, inclusivity, and accessibility (EDIA) as core components of its identity and operations?
- **Key Metrics and Success Framework:**
 - How can Sled Island measure the success of the proposed strategies, track progress and reach revenue targets?
- **Risk Analysis Report:**
 - What risks do these plans pose, and how might they impact the organization's short-term and long-term viability?

Phase 3: Implementation Roadmap

The primary goal for Phase 3 is to ensure the successful implementation of the multi-year festival strategy by translating strategies into actionable plans. The aim is to foster alignment across the organization and its stakeholders, support strategic initiatives, and ensure organizational resilience and effectiveness in executing the strategy.

- A. **Implementation Plan & Timeline:** Develop a detailed phased timeline outlining key milestones and activities for implementing the multi-year festival strategy, with clear deadlines, responsibilities, and dependencies. This timeline is set with a partial rollout in 2025 and full adoption for year 2026 and subsequent years. The plan should address the following focus areas:
 - a. **External Stakeholder Engagement:** Foster active engagement and collaboration with key external stakeholders throughout the implementation process, ensuring alignment, buy-in, and support for strategic initiatives.
 - b. **Monitor and Evaluate Progress:** Explore available tools to monitor and evaluate progress against goals and key performance indicators (KPIs) that identify successes, challenges, and opportunities for improvement.

- c. **Resource Requirements:** Explore how to meet resource requirements and ensure practical solutions are outlined for adopting model change, ensuring that the organization can execute the proposed initiatives effectively and within a reasonable and practical timeline.
- d. **Communications Plan:** Create a high-level plan to serve as the foundation for marketing and promotional activities. The plan should outline channel strategy, key messaging, and tactics to support the strategy, including segmentation analysis and targeted marketing initiatives.
- e. **Change Implementation:** Develop guidelines for successful organizational change adaptation. This includes recommendations for future recruitment (staff & board), succession planning, skills development & training, and capacity-building.

Phase 4: Sled Island Implementation Phase

Ongoing Support for Change Management TBD

Phase 4 of Sled Island's Strategic Change Period will be focused on implementation and led by Staff. Proposing organizations answering the RFP do not need to provide suggestions, proposed methodologies, or budgets for this phase but are encouraged to consider what they could offer for long-term ad-hoc engagement.

GENERAL RFP RULES

HOW TO SUBMIT

If you intend to submit an RFP for consideration, please inform Sled Island by email at chair@sledisland.com by Monday, March 25, 2024, at 5:00 pm MDT.

If questions arise from potential Consultants, Sled Island commits to sharing those questions and responses with all individuals who have expressed intent to submit. The deadline to submit questions or request clarifications is March 27, 2024, at 5:00 pm MDT. Questions must be submitted to chair@sledisland.com.

Proposals must be emailed to Rebecca Zahn at chair@sledisland.com by 5:00 pm MDT on Monday, April 8, 2024.

Please submit proposals in PDF format via email.

ITEMS TO BE ADDRESSED IN THE SUBMISSION

- Project Outline - provide a detailed outline of what approach and processes you will utilize to achieve the project objectives.
- Tell us about your consulting experience in live entertainment, arts & nonprofit sectors
- Tell us about your expertise in providing consulting for organizational transformation
- Tell us about your approach to considerations of equity, diversity, inclusion, and accessibility.
- Provide a breakdown of costs associated with your proposal.
- Submit a copy of your CV or client portfolio and/or staff biographies
- Testimonials referencing past work

EVALUATION CRITERIA & REQUIREMENTS

The Consultant should have the following attributes:

- a) Five years of experience in live entertainment, arts, and/or non-profit events strategy,
- b) Five years of experience in organizational change at the non-profit level,
- b) Understanding of the Canadian municipal, provincial, and federal grant system;
- c) Ability to incorporate EDIA principles in program design;
- d) Competent, creative and experienced personnel to provide the requested services;

Sled Island will review each submission in detail, and each Consultant may be invited to present their services in greater detail remotely or in person. The review process will take into consideration the following factors.

- a) selection criteria, project fees, and the overall best interests of Sled Island at its sole and absolute discretion.
- b) assessment against the following ranking, not intended to be exhaustive or in ranked order of priority:

1. **Understanding of Requirements (10 points):**
 - Clarity and depth of understanding of the project scope, objectives, and deliverables.
2. **Experience and Expertise (15 points):**
 - Demonstrated experience in similar projects, with a focus on relevant expertise, qualifications, and successful outcomes.
3. **Methodology and Approach (15 points):**
 - The proposed methodology, approach, and strategies for achieving project goals, including innovation and efficiency.
4. **Team Qualifications (15 points):**
 - The qualifications, skills, and experience of the proposed team members, including their roles and responsibilities.
5. **Cost Proposal (10 points):**
 - Clarity, accuracy, and competitiveness of the proposed budget, including a breakdown of costs and any potential additional fees.
6. **References and Past Performance (15 points):**
 - The quality of references provided and the organization's past performance on similar projects.
7. **Compliance with Requirements (10 points):**
 - Adherence to RFP instructions, guidelines, and submission requirements.
8. **Diversity and Inclusion (10 points):**
 - Commitment and strategies for promoting diversity and inclusion in the project team and execution.

Evaluations are not limited to the above-listed criteria. Other criteria may be identified during the evaluation and will be applied evenly and fairly to all proposals.

Sled Island will rank the Proposals, identify a preferred Consultant, and negotiate the project contract on the basis of the RFP terms, considering only minor adjustments.

Should, in the opinion of Sled Island, negotiations fail to result in an Agreement within a timely manner, Sled Island reserves the right to negotiate with others who submitted Proposals or recommence the RFP process.

Sled Island reserves the right to select whichever Consultant it deems appropriate for its requirements without having to justify its decision, which remains fully discretionary at all times. The decision of Sled Island with respect to the evaluations is final.

Consultants will be notified by email of the decision whether as an acceptance of the proposal or otherwise.

Sled Island reserves the right to interrupt or cancel, in part or in whole, this RFP as it sees fit.

Any contract awarded will be subject to additional terms and conditions, including terms governing the use and confidentiality of information obtained in the course of the work, procedures for any disputes between the parties in the course of the work, and any other terms Sled Island deems necessary for the work to be carried out. A sample contract can be found at this [link](#).

BUDGET & PAYMENT TERMS

The not-to-exceed budget for the Consultant is \$70,000 for the 8-month term of engagement under Phase 1, Phase 2 and Phase 3. It is exclusive of GST. Any additional expenses or costs, such as travel or materials, will be at the expense of the Consultant.

The compensation structure and payment terms for the selected proposal are subject to negotiation and will be based on deliverables being met at the end of each Phase at the reasonable satisfaction of Sled Island. We recognize the importance of aligning these elements with the unique requirements and timeline considerations of the awarded project.

Upon selecting the successful proposal, we anticipate engaging in collaborative discussions to mutually agree upon a compensation framework and payment schedule that reflects the scope and intricacies of the project.

LEGAL AND CONFIDENTIALITY REQUIREMENTS

Obligation to Maintain Confidentiality:

- All information provided in response to this RFP, including but not limited to proprietary data, business strategies, and financial information, shall be treated as confidential.

Non-Disclosure Agreement (NDA):

- By submitting a proposal, the responding party agrees to enter into a Non-Disclosure Agreement (NDA) to safeguard the confidentiality of information shared during the proposal evaluation process.

Use of Information:

- Information provided in response to this RFP shall only be used for the purpose of evaluating and responding to the RFP. It shall not be disclosed, copied, or used for any other purpose without explicit written consent from the issuing organization.

Confidentiality Duration:

- The obligation to maintain confidentiality remains in effect beyond the conclusion of the RFP process and shall endure for a period of 6 months from the date of disclosure.