Request for Proposal
Business Planning Services

ASHÉ CULTURAL ARTS CENTER

SUBMISSION DEADLINE:

November 25, 2020
1.0 **PURPOSE**

The purpose of this contract is to provide an implementation strategy for our strategic plan, adopt performance measures and benchmarks, and a multi-year financial forecasting process. The Consultant and project management staff will co-create a work plan and schedule. The work plan will clearly identify consultant versus staff deliverables and key dates for the completion of the following five tasks. These tasks are not sequential and may be completed concurrently, or in any order that facilitates the process.

1.1 **BACKGROUND**

Ashé Cultural Arts Center will hire a consultant to co-create, design, and vet a viable business operating model that is constructed from a culture production/presenting lens, a community needs/responsiveness lens, an economic viability lens (revenue generation, cost controls, strategic partnerships), a human resources lens (required skills, capacity, relationships, clarity of roles and responsibilities, professional development opportunities, and accountability), and a governance lens (to steward Ashé towards the new vision). Our process will produce a stakeholder engaged plan, complete with 5-year pro-formas and concrete steps for short-, mid-, and long-term implementation.

In its charge to preserve and build Ashé’s assets portfolio, our strategic plan posits that we are “in a position to expand and leverage a powerful brand. It could refine and focus its assets to establish an Ashé District…that can attract and service community members and audiences, local to global.” This plan is essential to building Ashé’s expanded revenue strategy, and perhaps more importantly, our critical ability to maintain black ownership in a space where blackness is being aggressively displaced.

1.2 **SCOPE OF WORK**

**Task 1 – DEVELOP** Finalized timeline, work plan, and business plan structure will be developed by becoming familiar with Ashé CAC internal processes, current resource management efforts, external long-range plans, trends, goals and strategies. Begin to distill multiple priorities and sets of information into business planning process and templates pursuant to a developmental maturity model framework, with results-based accountability measures. Plan for assessment and documentation of steps, tasks, learning and outputs of tasks.

*Task 1.1 – Identify Business Plan Advisory Committee:* Working with Ashé CAC staff and board, the Consultant will establish a working group to revalidate the Strategic Plan and develop a Business Plan. This working group will have the responsibility to periodically report progress and ultimately make a proposal to the full Ashé CAC Board of Directors for the adoption of the Business Plan.

*Task 1.2 – Conduct Document Review:* The Consultant will conduct a document review of the Ashé CAC strategic plan, real estate development plans, architectural plans, all community, municipal, state, and federal planning and governing documents that may influence the plan’s goals and projected outcomes.

*Task 1.3 – Conduct Stakeholder Outreach:* The Consultant will conduct stakeholder outreach, starting with individual interviews with all the members of the Board and staff. This effort would then expand to other key stakeholders including residents, members of neighboring businesses, potential investors, and local jurisdiction planning and finance officials.

*Task 1.4 – Define the Business Plan Structure:* Develop an over-arching business plan to focus the
organization on its vision, mission, goals and strategy for achieving those goals. Performance based budgeting will be established as the process that uses performance measures to link the operating, programmatic, and capital budgets with goals, results and desired outcomes.

TASK 2 – ADOPT PERFORMANCE MEASURES AND BENCHMARKS All performance measures will differentiate between operating, programmatic, and capital activities. Capital investments may have a determination of efficiency and effectiveness (e.g., one design versus another) measured differently from operating (e.g., employee absenteeism rates), and programmatic (e.g., number of artists served). Capital investments will also be arrayed into investments for expansion versus investments for maintenance of the operation.

Task 2.1 – Define Strategic Performance Measures: For each goal established in Task 1.4 the Consultant team will work with the Advisory Committee to establish quantifiable measures that allow all stakeholders to evaluate progress toward achieving that goal. There will be a one-to-one relationship between each strategic goal and its quantifiable performance measure.

Task 2.2 – Define Tactical Performance Measures: Consultant will work with Staff to identify quantifiable performance measures and goals for each element of Ashé’s organization chart. These tactical performance measures will cascade from the higher-level strategic performance measures. The tactical performance measures will use benchmarks and workload indicators as the basis by which budgets link resource levels with results and desired outcomes established as tactical goals. Budget resources necessary to achieve these tactical goals will be arrayed programmatically and identified by the organizational unit to be held accountable for final results.

Task 2.3 – Define Benchmarks: Each performance measure must be “backcast” five fiscal years to establish benchmarks for setting goals and evaluating future performance. Staff will collect the necessary data to allow for historical review of prior performance.

TASK 3 – DEVELOP MULTI-YEAR FINANCIAL FORECAST Stable and reliable forecasting will improve Ashé’s ability to plan for and fund our programmatic, operating, and capital budgets.

Task 3.1 – Create 5-Year Capital Improvement Plan: Based on needs identified in the Stakeholder Outreach and Document Review. This plan will then cascade down to the 3-Year Capital Improvement Program (CIP) for funding and execution by project. Each project in the CIP will be tied to a specific goal from the strategic plan. Narrative will be prepared to explain the strategic importance of each project along with its anticipated impact on the operating budget and operating performance measures.

Task 3.2 – Identify Operating Budget Impact of Each CIP Project: Consultant will work with Ashé CAC staff to develop a procedure for quantifying the operating budget impact of all CIP projects. This task will include development of performance measures appropriate to each investment, in as common a unit as possible to facilitate comparison among investments. The impact will be measured in terms of annual operating cost increases or decreases and any potential revenue increases or decreases.

Task 3.3 – Reporting to the Board Finance Committee: Consultant will work with staff to develop a quarterly operating and programming budget performance report and a semi-annual capital performance report. The quarterly report will include: current and year-to-date actual versus budget revenue results, expenses, subsidy and status of operating reserves. The quarterly report will also include ongoing strategic performance measurement results and variance from goals with narrative explanation of causes and discussion of actions to be taken to achieve goal attainment. The semi-annual report will supplement the quarterly report with capital budget information including: budget versus actual expenditures, schedule adherence, status of capital reserves, grant status and funding levels and narrative discussion of project issues as they develop.
TASK 4 – CONDUCT BEST PRACTICES REVIEW  Ashé CAC exists as a hybrid type of organization, we are arts and culture, community development, housing affordability, and advocacy. Therefore, we have the opportunity to adopt best practices from a wide array of comparable organizations in the both the public and private sector.

Task 4.1 – Real Estate Peer Review: The Consultant shall perform a peer review of operating and capital budgeting processes at comparable operations. This review shall include assessment of performance measures and goals, benchmarks and workload indicators used at peer properties.

Task 4.2 – Peer Review of Other Comparable Private and Public Sector Organizations: The Consultant shall report on best practices in budgeting and performance measurement currently in place and being successfully used at other comparable organizations. This report should be arranged by business function so that business activities may be compared. This report should also identify where comparable private and public sector organizations have successfully competed non-core business functions to gain efficiency or productivity improvements (e.g., information technology, employee benefits administration, printing and copying, security, building maintenance, etc.)

Task 4.3 – Peer Review of Board Activities and Procedures: The Consultant shall report on best practices in the activities of governing boards and the execution of their duties and responsibilities. The report should identify areas where boards have taken steps to increase organization performance and accountability, reduce process and administration, and grow stakeholder value in the organization.

TASK 5 – DOCUMENT DELIVERABLES Baseline business planning document, in digital and printed presentation formats, designed to include organizational vision and goals, resource management tools, long range plans, trends, strategies, and processes to produce outputs aligned to Ashé CAC activities.

Task 5.1 – Meeting notes, finalized timeline and workplan

Task 5.2 – Research and marketing data compiled

Task 5.3 – Business plan, full and truncated versions

Task 5.4 – Renderings

Task 5.5 – Pitch deck

1.3 PERIOD OF PERFORMANCE

The timeframe of this work is expected to be from December 2020 – May 2021.
1.4 **FORMAT REQUIRED**

The proposal is required to include all information specified within the body of the proposal. The proposal shall be presented in tabbed sections as described below. Responses of a boilerplate nature, or which merely provide a review of vendor qualifications will not be accepted as responsive.

To be considered, the proposal shall respond to all requirements of this part of the Request for Proposal and shall be signed by an individual authorized to bind the firm. Any other information thought to be relevant, but not applicable to the categories below, may be provided as a separate appendix to the proposal. The proposal should be concise and to the point. The proposal should include the following:

1. **Title Page** - Show RFP subject, name of firm, address, telephone number, name of contact person, and date.

2. **Table of Contents.**

3. **Letter of Transmittal** - Shall include an affirmative statement of your understanding of and interest in this RFP, the name of the firm, the location of the principal place of business, the type of business entity (i.e., corporation, partnership, etc.) and the state of incorporation. The letter shall be signed by an authorized representative of the firm.

4. **Qualifications and Experience of Firm** – Demonstrate the firm’s understanding and qualifications for completing the necessary work, evidence of firm’s ability to perform this type of work, and any record of past experience including similar projects relative to municipal, governmental, redevelopment and housing authorities, or other political entities. Indicate length of time the firm has been in operation and describe the firm’s core competencies. Include profile of firm’s principals, staff, and facilities. Describe any qualities that your firm possesses that will enhance, provide continuity, and contribute to the efficiency of providing this service. Demonstrate firm’s capability to work statewide, within the state of Louisiana. (Evaluation Criteria A)

5. **Qualifications and Experience of Key Personnel** – Identify the individual(s) that will be assigned to this project, their relevant qualifications, training, responsibilities, and resumes. Be specific as to their level of experience with community organizations, particularly as it relates to this scope of services. List any contractors or third parties which will be potentially involved in providing services.

6. **Approach and General Understanding** – Describe your firm’s philosophy and strategy for business planning and organizational development. Provide a description of successful projects that the firm has developed that have relevancy to the objectives of this RFP. Include innovative approaches that were successful in achieving the client’s objectives. Describe the firm’s approach to community engagement, revenue generation and organizational development. Include samples, case studies, program summaries and/or other communications that exemplify the firm’s capabilities and successes.

7. **References** - Supply three (3) current references. Provide names, contact number, date of service and description of the work performed.

8. **Price** – Include the firm’s proposed budget and fees for performance period.
1.5 **SUBMITTAL SPECIFICATIONS**

All proposals must be submitted in accordance with the specifications of this proposal. No requirement and/or specification should be construed as an attempt to limit competition.

1.6 **WITHDRAWAL OF PROPOSAL**

Proposals may be withdrawn by written or faxed request dispatched by the firm in time for delivery in the normal course of business and prior to the time fixed for receipt of proposals. However, requests that are faxed must be followed up by a written confirmation, signed by the firm. The same person signing the proposal must sign the withdrawal request.

1.7 **RECEIPT AND OPENING OF PROPOSAL**

One electronic copy of the proposal should be forwarded to Asali DeVan Ecclesiastes at ceo@ashenola.org, with subject line “Proposal for Business Planning Services,” **no later than 6:00 P.M. on November 25, 2020.** Proposals received prior to the due date will be securely kept. No proposals will be received after the designated time and date.

Should Ashé Cultural Arts Center close earlier than normal hours due to uncontrolled events such as fire, a weather event, or building evacuation, proposals will be accepted on the next business day.

1.8 **CONTACT INFORMATION**

Questions concerning this RFP shall be directed to Patricia Heno-Smith and shall be e-mailed to patricia@ashenola.org and shall be the responsibility of the sender to verify receipt of all emails. **Ashé Cultural Arts Center shall not be responsible for missed emails.** All questions must be submitted by Noon on November 20, 2020, and both the question(s) and answer(s) will be shared with everyone Ashé Cultural Arts Center knows is interested in responding to this RFP.

1.9 **EVALUATION CRITERIA**

The following criteria will be used in the evaluation of proposals:

A. **(Weighted 30%)** Specialized experience and technical competence; in particular, the demonstrated ability to collaborate with community residents, organizations, and businesses in a community-led process, administered by Ashé CAC, to determine and accomplish the project’s multi-faceted goals. Thoroughness and applicability of methodology and soundness of design and approach presented by respondent and its demonstrated understanding of the community’s programmatic needs with respect to and understanding of the Scope of Work.

B. **(Weighted 30%)** Performance history, including, competency, responsiveness, cost control, work quality and the ability to meet schedules and deadlines, as evidenced by the strength of qualifications of key personnel, individually or collectively, and the degree of relevancy and success in past performance of efforts of a project of comparable scope, size, complexity, and nature; and references.

C. **(Weighted 20%)** Participation in and willingness to adhere to, advance, and promote full and equal business opportunities in accordance with the City’s State-Local Disadvantaged Business Enterprise Program and in alignment with the Ashé Cultural Arts Center Strategic Plan.
D. *(Weighted 10%)* Maintenance of an office, residence or domicile in Orleans Parish, to the extent permitted by law, with preference given to those business with a history of work and/or service in Central City or the larger Claiborne Corridor.

E. *(Weighted 10%)* Proposed budget and fees.

F. Certified statement that the firm is not debarred, suspended, or otherwise prohibited from professional practice by any Federal, State, or Local Agency. *(Note: This is a yes or no criterion; if the answer is no, the firm is disqualified, not point scored.)*

### 1.10 EVALUATION AND SELECTION PROCESS

During the evaluation phase, proposals are reviewed by the Ashé Cultural Arts Center Evaluation Committee to determine which addresses all the requirements of the RFP and to technically review the proposals. Proposals determined to be non-responsive will be eliminated at this point. Once the qualified firms have been determined, the committee shall rank all responsive proposals.

Ashé Cultural Arts Center reserves the right in its sole discretion to award a contract related to this RFP based upon the written proposals received, without interviews or prior discussion or negotiation with respect to those proposals. However, each firm choosing to submit a proposal should be willing to attend a virtual conference for negotiations. Ashé Cultural Arts Center reserves the right to request additional information from any or all respondents as necessary to clarify any information which is contained in the proposals. Negotiations shall be conducted with the firm ranked first. If a contract satisfactory and advantageous to Ashé Cultural Arts Center cannot be negotiated with the firm ranked first, then negotiations may be conducted with the firm ranked second, and so on until a contract has been negotiated or all proposals are rejected. Based upon Ashé Cultural Arts Center’s proposal review and conference, the firm’s contract will be forwarded along with a recommendation for contract approval to the Executive Director. Upon that approval, a contract will then be executed.

All portions of this RFP may be considered to be part of the contract and may be incorporated by reference.

Ashé Cultural Arts Center does not discriminate against faith-based organizations nor any person on the basis of race, color, sex, religion, national origin, age, familial status, or physical ability.

### 1.11 CONFLICTS OF INTEREST

Firms submitting proposals must identify and disclose any real or apparent conflicts of interest with Ashé Cultural Arts Center.

### 1.12 INSURANCE

The firm selected for award shall maintain, at its own expense, insurance coverage for their operations, with terms and limits agreeable to Ashé Cultural Arts Center, and shall name Ashé Cultural Arts Center as an additional insured with respect to the work performed for Ashé Cultural Arts Center, and shall provide Ashé Cultural Arts Center a Certificate of Insurance prior to execution of a contract.