

## Request for Proposal - Equity/Diversity/Inclusion Consultancy

### INTRODUCTION

**Symphony Tacoma** is seeking proposals for an EDI Consultancy—we are excited and hope you are inspired to join us on this journey!

By submitting a proposal, a candidate agrees to comply with the process as outlined and understands that acceptance of a proposal will occur when a contract is executed. Consultants responding to this RFP are requested to:

- » Become informed about the organization and aspects of the work to be performed.
- » Submit a proposal as described below to Executive Director Karina Bharne ([kbharne@symphonytacoma.org](mailto:kbharne@symphonytacoma.org)), in writing (PDF) and/or via video(s).

**PLEASE ADDRESS THE UNDERLINED ITEMS (PG 4) AND SPEAK TO YOUR QUALIFICATIONS (PGS 6-7) TO THE BEST OF YOUR ABILITY.** Upload any video submission(s) through an unlisted link on [youtube.com](https://www.youtube.com) through your personal YouTube page. Production quality of videos will not be judged, and cell phone videos are acceptable.

*Please limit written proposals to 5 pages, 11pt font and video proposals to 5 minutes.*

*OPTIONAL: Written and video proposals may be accompanied by video clips illustrating your skills, such as event facilitation, leadership coaching, etc. Please limit supplementary video content to 5 minutes.*

We realize this is a comprehensive RFP and hope it demonstrates our commitment to this important work. We sincerely thank you for your time in completing a submission. **For more context on the Symphony, our EDI journey to-date and current foci, review this document, our 2021-22 Season Concert Schedule and the excerpts from an application for the grant awarded to fund this project (Addendums 1 & 2).**

## RFP Schedule: Key Dates

Event	Dates
Request for proposals to Symphony Tacoma accepted	Through February 1
Proposal review	February 2-4
Window for follow-up questions sent to consultants	February 7-9
Applicants not invited for interviews notified of status	February 9
Consultants invited to meet with review committee (30-minute conversations max., questions to be sent in advance)	February 10-11
Second conversations with selected finalists/verification of qualifications (30-minute conversation max., questions to be sent in advance)	February 14-15
Selected consultant notified	February 16
Anticipated project start	TBD with consultant

### 1. BRIEF CONTEXT

Symphony Tacoma, part-time professional ensemble founded in 1946

**Mission:** *Building Community Through Music*

**Vision:** *Innovative. Vibrant. Engaging. Everywhere!*

It is 2025 and with every performance Symphony Tacoma creates a freshness that makes it stand out among Pacific Northwest orchestras. Its innovative and vibrant programs delight an ever-expanding and diverse audience, including in non-traditional venues. Musicians play with skill, joy and pride. Performances—whether in the hall, on the green or in the schools—are engaging and transformative for both ensemble and listener. Young and old, musical neophytes and veterans alike flock to experience orchestral music that is innovative and building community everywhere.

## **Values:**

**PERFORMANCE:** Symphony Tacoma upholds high artistic and professional standards with continuous, measurable improvement. We present performances that are unique, informative and appealing, that engage the audience and performers provide a magical experience for both.

**EDUCATION/OUTREACH:** Symphony Tacoma provides opportunities for diverse audiences to experience the art form in relevant, entertaining and approachable ways, making the art form engaging to existing audiences and appealing and welcoming to those who would otherwise not have the opportunity to experience it—with a particular focus on non-majority youth.

**STEWARDSHIP:** Symphony Tacoma is a responsible steward of symphonic music in order to keep it available to the community in all its forms. We utilize the financial resources entrusted to us with wisdom, maintaining sound financial practices and a culture of transparency. We strive to engage all of our partners and are responsive to their ideas. We manage our human resources, both paid and volunteer, with integrity and care.

**PEOPLE:** Symphony Tacoma is a “people” organization at heart, with a dedication to customer service; a sense of belonging for and loyalty from musicians, staff and board members; and patron enthusiasm and support. We treat and compensate our musicians and staff as the professionals they are. We are respectful of the time, talents and ideas of our board members and other volunteers.

**COMMUNITY:** Symphony Tacoma is a collaborative, respectful organization and promotes an atmosphere of service to our community. We work in partnership with the larger arts sector and are growing to embrace more non-majority partners to address local needs. We seek innovative ways to ensure that Symphony Tacoma is a nimble resource for the community.

## **2. GOALS AND OBJECTIVES FOR EDI CONSULTANCY**

Symphony Tacoma recognizes the fluid nature of organizational change. Therefore, the goals and objectives written below are a starting point and aspirations for the future. We recognize these may change as we progress.

- A. **INTERNAL:** Work with board and staff representatives to create policy regarding the recruitment of board and staff members. Board member mentorship around equitable recruitment practices, with the end goal of becoming a more inclusive administration.

Identification of strategies to strengthen board retention, including how to best engage with new members to create a sense of belonging.

- i. As part of the response, please share your ideas for specific ways for our board to identify and avoid tokenism. Please discuss successful recruitment tools that you have witnessed in recruiting and retaining diverse board members.
- B. INTERNAL: Partner with the Music Director, Executive Director and General Manager to update the Collective Bargaining Agreement’s language around orchestra auditions to integrate guidelines from the National Alliance for Audition Support. Identification of areas for growth with regard to diversity in artistic programming–repertoire and guest artists (vs. community service). Review of current marketing strategy and collateral material through an EDI lens, offering best practices when applicable.
- i. As part of the response, please review our 2021-2022 concert season and the diversity of our programming. Briefly describe impressions of our strengths, weaknesses and opportunities (our perceived challenges will be shared at interviews).
  - ii. As part of the response, please discuss any multicultural marketing and public relations experience and/or credentials of yourself or your team that could assist us on the journey.
  - iii. As part of the response, please include a referral list, particularly highlighting any orchestras (and/or arts organizations) of our size you have worked with.
- C. EXTERNAL: Assessment of our *current* partnerships for effectiveness. Determine if we are partnering with the right organizations. Are our partnerships reciprocal, of substance and meaningful? If not, how can the Symphony better serve our community through new relationships?
- i. As part of the response, please review our current partners list and comment on potential areas for growth.
- D. EXTERNAL: Development of effective methods for initiating new dialogues with non-majority community groups, refraining from disingenuous tokenism. Strengthening our stewardship of new partnerships with non-majority community groups in ways that can bring us closer together, sharing our resource of music and furthering our mission.
- i. As part of the response, please identify specific examples of ways that your firm has guided and witnessed organizations in successfully forming meaningful and enduring partnerships–particularly with regard to serving marginalized youth. Please

also discuss metrics that have proven successful to evaluate the strength of organizational partnerships.

### 3. SCOPE OF SERVICES

#### 3.1 CONSULTANT ACTIVITIES

Collaborate with us to determine activities essential to perform in the consultancy, including, but not limited to, e.g.

- Facilitating monthly conversations or processes and attending either the Community Connections Committee, Executive Committee, Staff or Board Meetings as needed;
- Conducting assessments and refining current and evolving EDI status, beginning with an institutional audit (including board recruitment practices), then moving on to our EDI action plan, and ending with conversation facilitation such as focus groups;
- Working with Executive Director, General Manager, Music Director and Musicians to discuss and make recommendations on equitable musician audition/tenure policies and procedures;
- Advising the Executive Director, General Manager, Music Director and Musicians on the accessibility and diversity of upcoming music programming and working with this group as needed;
- Assessing and strategizing with regard to past, present and future community collaborations for the three years of the consultancy relationship;
- Working in tandem with us to develop a strategic direction, for both in and out of the concert hall, helping us to chart actions for the next three years and beyond.

#### 3.2 EXPECTED DELIVERABLES AND ANTICIPATED TIMELINES\*

- Successful coaching of organizational representatives, expanding skills for initiating productive internal EDI dialogues and growing external relationships with non-majority groups;
- Availability for mentorship and guidance, as mutually agreed upon;
- An institutional audit of current EDI practices (By December 1, 2022);
- A document describing Symphony Tacoma's shared values and EDI imperatives/priorities (by December 1, 2022);
- A report recommending a substantive set of actions for an EDI plan (By July 15, 2023);
- Conduct surveys, focus groups and/or other conversations to assist individual committees create EDI related guidelines and develop the tools necessary to grow both internal processes and external competence around community

engagement with non-majority groups, as well as multicultural marketing and communications. (By July 15, 2024).

### 3.3 PROJECTED MILESTONES WITH PROPOSED PAYMENT SCHEDULE\*

#	Activity	Date	Payment to Consultant
1	Engagement with consultant begins	Jul. 15, 2022	25% of contract value
2	Institutional audit and set EDI imperatives/priorities	Dec. 1, 2022	25% of contract value
3	EDI action plan	Jul. 15, 2023	25% of contract value
4	Conversation facilitation	July 15, 2024	25% of contract value

*\*Deliverables and timeline may be subject to change, if mutually agreed upon, after assessing the situation and incorporating the consultant's expertise.*

### 3.4 CONSULTANT QUALIFICATIONS

Ideally, our preference is to contract with a consultant who has experience working with orchestras, specifically those with budgets between \$1M-\$2M, regardless of location. (A candidate with extensive experience with other arts organizations may also be considered). An added plus would be an individual with some degree of knowledge of the culture of the Tacoma/Pacific Northwest community, as well as a marketing background with strength in speaking to all voices.

We recognize that this range of experience might not be found in one individual or firm, therefore we or the consultant may hire a subcontractor for part of the work.

In addition to a readiness to undertake the activities outlined in this RFP, a consultant should share a deep understanding of the current overarching socioeconomic climate as it relates to anti-racism and non-majority inclusion, as well as demonstrate:

- Evidence of a breadth and depth of knowledge of EDI philosophies and current best practices and common pitfalls;
- Experience working on consultancies of similar size and/or scope;

- Proven analytical skills, qualitative and quantitative research skills, facilitation and conflict resolution skills, exceptional written and verbal communication skills and any other specialized knowledge necessary for completing the project successfully;
- And above all, a true passion for, and commitment to, systemic change.

### 3.5 ADDITIONAL REQUIREMENTS

If the consultant is not located in the Pacific Northwest, a strong internet connection with Zoom capabilities is necessary. Willingness to travel twice a year to the Pacific Northwest is a plus.

### 3.6 REPORTING, COMMUNICATIONS AND ACCOUNTABILITY

The selected consultant will liaise closely and work in collaboration with Executive Director Karina Bharne, the Community Connections Committee and at times with other staff members and Executive Committee. The consultant keep the Executive Director, or designee, apprised of progress on the work and timelines on at least a monthly basis and be held accountable for meeting agreed upon goals.

## 4. PROJECT BUDGET

Subject to the satisfactory completion of the services, Symphony Tacoma shall pay the selected consultant up to \$60,000 to complete this work, according to the payment schedule identified above at Clause 3.3. Consultant is required to prepare a detailed budget when submitting their proposal, including consultancy fees and administrative support charges, with unit cost and the number of hours/days proposed to be devoted to the project.

## 5. CONFLICT OF INTEREST

At the time of submitting a proposal, the consultant agrees there is no conflict of interest (real or perceived) unless specifically and clearly identified in their proposal with a recommended plan to manage any conflict of interest. Conflict of interest will be defined as any situation in which an individual or organization is in a position to exploit his/her professional or official capacity in some way for personal or corporate benefit. The consultant agrees to notify Symphony Tacoma immediately if an actual or potential conflict of interest arises.