



REQUEST FOR PROPOSAL: STRATEGIC PLAN

Executive Summary

Shunpike empowers artists through equitable access to vital expertise, opportunities, and business services. Shunpike envisions a community where independent artists and arts groups thrive, creatively and economically, and where their work is widely valued as fundamental to the cultural, social, and economic well-being of Washington State.

We have completed the cycle defined in our last Strategic Plan and are seeking assistance from up to three consultants with deep experience in strategic planning who will partner to facilitate, organize and co-develop with us a Strategic Plan to take us through the next five years and into 2028.

The below document describes who we are, our requirements for this project and the process of the RFP itself.

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Shunpike Overview

OUR MISSION

Shunpike empowers artists through equitable access to vital expertise, opportunities, and business services.

OUR VISION

Shunpike envisions a community where independent artists and arts groups thrive creatively and economically, and where their work is widely valued as fundamental to the cultural, social, and economic wellbeing of Washington State.

OUR VALUES

Equity : We embrace all artforms, as well as racial, cultural and social diversity.

Relevance : We actively maintain an awareness of emerging trends in arts practice so we can offer real-world arts business solutions and services.

Accessibility : Our programs and services are affordable, convenient, and artist-centered.

OUR MANIFESTO

1. **ART MAKES LIFE INTERESTING.** It reframes the dialog about contemporary society by asking big questions, inspiring new approaches and challenging the status quo.
2. **THE ARTS ARE NOT SEPARATE FROM SOCIETY BUT CENTRAL TO IT.** Inclusive, forward-thinking places recognize this and embrace the arts as essential to community wellbeing. Shunpike works with the communities and the artists that call them home to foster a robust infrastructure for sustainable artistic production.

3. **GROUNDBREAKING IDEAS ARE FORGED AT A GRASSROOTS LEVEL** . The work of independent artists and arts groups animates our cities and neighborhoods in new and surprising ways, making them dynamic places to live and work.
4. **THE CONTEXT IN WHICH ARTISTS CREATE WORK IS FLUID** . We work with artists to help navigate this flux and build resilience and agility in the face of change.
5. **OUR SUPPORT IS EMBEDDED IN THE EVERYDAY** . We provide relevant and accessible services and programs that encourage and enable sustainable models of operation.
6. **WE ARE RESPONSIVE TO ARTISTS' NEEDS** . Artists need administrative support and a way to raise money; they need opportunities to show their work and spaces in which to work; they need environments where they can come together, share their experiences and gain practical skills.

Key Shunpike Initiatives and Programming

Fiscal Sponsorship: Our longest-running program, Shunpike has served as the fiscal sponsor for hundreds of arts organizations and groups throughout Washington-state. Under the umbrella of Shunpike's non-profit charitable 501(c)(3) status, our fiscally-sponsored organizations can receive tax-deductible contributions from individual donors, granting institutions and corporate sponsors. Shunpike also provides additional back-office and administrative support services for these organizations.

Storefronts

Storefronts is an innovative arts program that activates communities, neighborhoods, and streets by matching the work of local artists with vacant or under-utilized retail spaces.

ACES: Artists of Color Expo & Symposium

Artists of Color Expo & Symposium (ACES) is a two-day, POC-led, community-curated program with performances, exhibits, presentations, workshops, listening opportunities, and open forums.

The Studio at 2+U

The Studio at 2+U provides opportunities for workshops, rehearsals, and presentations at the new 2+U building in the heart of Downtown Seattle. The Studio is created with underserved creative communities in mind – those most affected by gentrification and displacement.

Amazon Artist-in-Residency

Amazon's Artist in Residence program provides artists a ten week residency in on-site art studios at the South Lake Union Seattle or Bellevue Headquarters.

Seattle ReSTORED

Seattle Restored calls our local artists and entrepreneurs to reinvigorate our city by activating empty storefronts, benefiting neighborhoods, small businesses, artists and property owners. This program creates vibrant and engaging streetscapes that encourage the public to visit

downtown Seattle, support local businesses and support local artists – particularly Black, Indigenous, and other entrepreneurs and artists of color. Seattle Restored is run in partnership with Seattle Good Business Network, with funding and guidance from Seattle Office of Economic Development.

Arts Business Clinics

Arts Business Clinics invite professionals in the field to present on arts business topics from marketing to fundraising, strategic planning to basic budgeting. Whenever possible, clinics are open to the public.

Arts Business Dates

Arts Business Dates are 30-minute one-on-one meetings with experienced arts professionals where you can ask questions specific to your arts project or creative enterprise.

Project Overview, Objective and Goals

Shunpike is seeking to develop a five-year Strategic Plan that will guide our operations from 2023-2028. We are seeking to engage a small team of people (1-3) who will lead us in this process, using strong project management, facilitation, and stakeholder engagement.

Shunpike's DEI Focus

One of the key areas of focus in our last strategic planning effort was developing Shunpike's culture and practices to facilitate learning, growth, and continuous improvement in Equity, Diversity, and Inclusion. Our Racial Equity statement and our EDI Committee were born out of this plan.

But we can go further. We expect that any Strategic Planning exercise—and in fact the finalized Plan itself—will reflect our growth to date and will assist us in continuing our journey toward operating our organization in a manner consistent with principles of increasing Equity, promoting Diversity, and fostering Inclusion in all we do.

Objectives and Goals

Successful RFP responses will illustrate your ability to:

- Lead our stakeholders in exercises intended to:
 - Capture and evaluate our current operating model, our programs, and our culture
 - Elicit input and feedback on the above
 - Identify opportunities for organizational growth
- Help us craft a revised or new vision for the next five years that strengthens Shunpike's mission fulfillment

- Drive development of a Strategic Plan document and seek buy-in from all stakeholders and staff

Areas of Focus and Questions We Wish to Answer

- Do our current mission, vision, and values continue to serve who we are and what we want to become?
- What are Shunpike’s Core Competencies? Are they unique in the industry? Are all of our services critical? What should we develop further? Are there any of our services and practices that are no longer serving us and should be retired?
- What are the key strategies that emerge from your findings and assessment of our organization and does the committee and Executive Director concur with these?
- How do our values centered around Diversity, Equity, and Inclusion enmesh with our current culture and strategies? How will they grow and support our future direction?

Key Stakeholders & Participants

Title	Role
Executive Director	Primary contact and accountable for the Strategic Plan
Strategic Planning Committee	Composed of selected Board and Staff Members. A key contact for many of the deliverables.
Board of Directors	Participants in Retreat
Shunpike Staff	Participants in Retreat

Our Requirements

Successful RFP Responses will address the following requirements:

- Bring strong and rigorous project planning, project management, and meeting facilitation.
- Develop and present a feasible project plan and timeline.
- Conduct and facilitate key activities, such as interviews and focused work sessions with internal and external stakeholders (e.g., staff, board of directors, clients, program

participants) to capture diverse perspectives that help identify gaps and opportunities to inform the strategic plan.

- Perform research on Shunpike's behalf to augment and inform planning activities, including a review of the external landscape that identifies comparable organizations with similar services and clients.
- Develop, plan and facilitate a retreat in collaboration with executive director, board of directors and key staff. Retreat activities should include:
 - Exercises that develop/clarify key strategies and set actionable goals.
- Deliver a post-retreat summary to the planning committee and executive director recapping the planning process and retreat outcomes.
- Provide bi-weekly status reports to planning committee and executive director that highlight learnings to date and research efforts, upcoming milestones, retreat planning progress, and risks/challenges.
- Synthesize, edit, and prepare all documents and deliverables (see deliverables list below).
- Conduct a retrospective after the retreat with key stakeholders (to be identified during project planning efforts) to capture lessons learned about the process - what worked, what didn't, etc..

Your Approach and Methods

We have built this RFP using our own collective experience and memory of past strategic planning exercises. However, we want to acknowledge that while we consider the above requirements critical, we anticipate your response may illustrate differences due to your own approach or other methods to achieve our objectives that we have not thought of. This is completely acceptable and welcome.

In your proposal, please take efforts to address each of our requirements and how they will intersect with your approach and methods. If additional steps, milestones, or deliverables you believe are necessary are not captured in this RFP, please describe these as well.

We encourage consultants to partner with other specialists to fulfill the entirety of this scope, specifically in consideration of Shunpike's commitment to diversity, equity and inclusion. We are open to consultants bringing their full team, or we may pair consultants who submit complimentary proposals, to work together.

Deliverables

Each of the below deliverables will be further defined during initial planning exercises with the Executive Director and Strategic Planning Committee.

Deliverable	Description	Delivery Mechanism	Delivery To
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Statement of Work	<ul style="list-style-type: none"> • Will form the basis of our contract together. • Should include Services in scope and out of scope. 	Document	Executive Director, Planning Committee
Project Plan	<ul style="list-style-type: none"> • Timeline with intermediate deliverables & roadmap of activities • Required attendees for each activity (Stakeholder matrix) • Budget 	Document	Executive Director, Planning Committee
Retreat Agenda(s) and Plan	<ul style="list-style-type: none"> • Schedule of daily activities for the duration of the retreat(s) 	Document	All Participants
Retreat Invitation(s)	<ul style="list-style-type: none"> • Craft the retreat invitation(s) to be sent by Executive Director to all participants 	Document	Executive Director
Retreat Materials	<ul style="list-style-type: none"> • Based on your facilitation techniques, approach and methods, provide all necessary printed materials for the retreat(s) • Provide a list of hard goods (pens, markers, pads, etc.) to Shunpike staff for purchase ahead of retreat 	Varies	All Participants
Stakeholder Feedback Plan	<ul style="list-style-type: none"> • What approach will you take in gathering feedback from stakeholders? Include survey and/or interview questions, if applicable. 	Document	Executive Director, Planning Committee
Stakeholder Feedback Report	<ul style="list-style-type: none"> • Synthesis and analysis of findings from feedback gathering exercises • Anonymization for consumption by a larger audience may be required 	Document	Executive Director, Planning Committee

Strategic Plan	<ul style="list-style-type: none"> • Develop and edit up to three intermediate drafts and the final version of our strategic plan • Seek sign-off on the finalized plan from key stakeholders • Includes: key assumptions, recommendations for alignment, further research needed, processes for keeping the plan up-to-date year over year 	Document	Executive Director, Planning Committee
Visual Aid	<ul style="list-style-type: none"> • Creation of a one-page image of a summarized Strategic Plan that will remind us of the vision, values, and strategies we have agreed upon 	PDF and PNG file	Executive Director, Planning Committee
Retrospective Report	<ul style="list-style-type: none"> • Summarize feedback gathered during post-retreat lessons learned/retrospective meeting with key stakeholders • Anonymize feedback and group into themes 	Document	Executive Director, Planning Committee
Exit Survey	<ul style="list-style-type: none"> • Summary of consultant's experience working with Shunpike and suggestions for future improvement 	Document	Executive Director, Planning Committee

Out-of-Scope

You will not be responsible for the following:

- Securing space for the Retreat
- Arranging catering or other amenities for the Retreat
- Purchase of facilitation hard goods (e.g. dry-erase markers, whiteboards, flip charts, etc.)

Proposed Milestones and Timeline Considerations

Note - this is a minimum set of milestones. Your project plan and approach may include more and will be evaluated as part of our RFP review.

Milestone	Milestone Drivers	Recognized By	Pertains To
Engagement Start (“ES”)	Week of 4/10/23	Contract signed	Consultant, Executive Director
Kickoff Meeting	Week of 4/17/23 (work around Spring breaks)	Hybrid in-person and virtual meeting	All Participants
Project Plan delivered	ES + 3 weeks	Document	Executive Director, Planning Committee
Project Plan Reviewed and Notice of Continuation	ES + 5 weeks	Shunpike will internally review the project plan and sign-off	Executive Director, Planning Committee
Status Reports	Bi-weekly	Email/Slack	Executive Director, Planning Committee
Current State Assessment	Defined in your project plan	Document	Executive Director, Planning Committee
Interview Questions developed and approved by stakeholders		Document	Executive Director, Planning Committee
Collection Data using Approved Interview Questions		Document	Executive Director, Planning Committee
Interview Report Document: Internal Stakeholders		Document	Executive Director, Planning Committee
Interview Report Document: External Stakeholders		Document	Executive Director, Planning Committee
Strategic Planning Retreat		Facilitated Meeting held and completed	All Participants
Final Report: Draft 1		Document	Executive Director, Planning Committee

Draft 1 Review Period Concluded		All involved stakeholders have completed their feedback	
Final Report: Draft 2		Document	ED, Planning Committee
Draft 2 Review Period Concluded and stakeholder sign-offs acquired		All involved stakeholders have completed their feedback	ED, Planning Committee
Final Report: Strategic Plan	By 9/15/2023	Document	ED, Planning Committee
Retrospective Meeting	Week of 9/25/2023	Hybrid in-person and virtual meeting	ED, Planning Committee
Retrospective Report	Week of 9/25/2023	Document	ED, Planning Committee
Project Closure	9/29/2023	Exit Survey complete	

RFP Process, Selection Criteria, Contracting and Compensation

We are grateful for and recognize the significant effort an RFP response takes. Our selection process at a high level is as follows:

- Shunpike receives written RFP responses from all candidates.
- We will perform an initial evaluation of all responses and then choose candidates with whom we will conduct an interview.
- We will use weighted criteria to evaluate your response to this RFP (see below) and our findings from each interviewed candidate.
- We will then select our final candidate or candidates for the project.

Below is a table of some of the criteria of our evaluation that will be used to select our working team.

Major RFP Response Evaluation Criteria

RFP Response contains a high-level project plan that seems achievable and flexible enough to meet our staff and stakeholder capacity.
Experience of consultant in leading successful strategic planning efforts
Ability to work with a team of consultants to co-facilitate
Consultant's project management experience
Compatibility of approach and methods with our culture and team
Pricing - Value for services to be delivered and affordability
Proposed Retreat design and feasibility
Interview outcomes

RFP Process

We will adhere to the following schedule for the release, gathering and evaluation of this RFP and your responses.

Step	Timing
RFP Publish and Open for Submissions	Tuesday, 02/08/23
Candidate notification of your intent to respond	Monday, 02/20/23
RFP Question Period	02/20/23 - 03/6/23
RFP Submissions Due	Friday, 03/10/23
RFP Review Period (Shunpike)	03/06/23 - 03/20/23
Notice of intent to interview candidates	Tuesday, 03/21/23
Candidate Interviews	03/27 - 03/31/23
Contract Award Notifications	Wednesday, 04/05/23

RFP Questions

We will allow for email-submitted questions from RFP responders during the above Question Period. **Please note that in the spirit of equity and fairness, we will share our answers to questions you submit with all candidates.**

Contracting & Billing

Upon award of the Strategic Planning project contract, we will work with you to build a formal Statement of Work (SOW) which will serve as the base of a negotiated contract with Shunpike. We will validate this contract with our legal team, and both parties will sign to begin the engagement.

Shunpike will accept a fixed-fee price for this project.

For invoicing and payment, Shunpike will accept a milestone/deliverable schedule for completed work, as defined in your SOW, for each part of your fee.

Submitting your Response

The best responses to this RFP will address all of the requirements, deliverables, and goals above and include information about you, your experience, your approach and methods, and your price for services.

Please submit your written RFP response as a Word, Google Docs, or editable PDF format of reasonable length. We suggest no more than 30 pages, but length is not an evaluation criterion.

Budget information may be submitted in Excel or Google Sheets format if such information cannot be accurately represented in your primary RFP response.

Supplementary documents including promotional materials or other attachments to the main response are acceptable, but please keep in mind that we may not review them all and will focus on your RFP response.

Shunpike commits to keeping your RFP response and all supplemental documents you include confidential and will not share these with other candidates or parties outside the RFP Evaluation and Selection teams.

RFP Point of Contact for Questions and Submissions

For all questions and to submit your response, you may email Line Sandmark (line@shunpike.org). Phone calls to address your questions are possible, but must be arranged via email in advance. Proposals must be submitted in written format.

Thank you for the time and effort you put into responding to this RFP and for your interest in working with Shunpike.