REQUEST FOR PROPOSALS (RFP)
FOR
THE TORONTO CONSORT’s DIGITAL STRATEGY

April 23rd, 2019

Dear Proposer:

Proposals must be received no later than 4:00 pm, on Friday, May 3, 2019. All responses must be in a sealed envelope and have “DIGITAL STRATEGY PROPOSAL, RFP RESPONSE” clearly marked on the outer most mailing envelope.

Mail or Hand Deliver To:
The Toronto Consort, office 206
427 Bloor Street West, Box 15
Toronto, Ontario M5S 1X7

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 The Toronto Consort on this project. We look forward to receiving your response.

Sincerely,

Adam Thomas Smith
Director of Audience Engagement and Education
REQUEST FOR PROPOSALS (RFP)  
FOR  
THE TORONTO CONSORT’s DIGITAL STRATEGY

Primary Contact:

Adam Thomas Smith (he/him)  
Director of Audience Engagement and Education  
Email: adam@torontoconsort.org  
Phone: 416-966-1045
TABLE OF CONTENTS

Opportunity  Page 3
About Us  Page 4
Project Background  Page 5
RFP Requirements  Page 6
Project Timeline  Page 7
Schedule of Fees  Page 8

Appendix:
   i. Digital Maturity Assessment
   ii. Digital Needs Assessment
   iii. Digital Strategy
OPPORTUNITY

The Toronto Consort is looking to understand its current digital state, identify its digital gaps 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, The Toronto Consort 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:

1. Digital Maturity Assessment:
   a. Helps measure our current use of digital, identifies strengths and areas of improvement. Sample questions:
      i. How digital is The Toronto Consort?
      ii. What does The Consort do well digitally?
      iii. Where can The Consort make improvements digitally?

2. Digital Needs Assessment
   Helps identify where we want to be and highlights the gaps between current state and where we want to invest. Sample questions:
   i. What should The Toronto Consort prioritize when it comes to digital?
   ii. How digital should The Consort be?
   iii. How does The Consort benefit from improving our digital skills?

3. Digital Strategic Plan
   a. A plan that outlines The Toronto Consort’s digital goals and how to achieve them, with key sections:
ABOUT US

The Toronto Consort is Canada’s leading ensemble specializing in the music of the Middle Ages, Renaissance and early Baroque – roughly 1200 to 1675. Founded in 1972, the Toronto Consort is one of Canada’s first professional period-music ensembles. Over the past four decades, The Toronto Consort has continued to expand listeners’ appreciation through inventive programming that breathes life into period music.

Our concerts explore rarely-heard repertoire. We often work in collaboration with other artists, such as actors, dancers and visual artists, to produce concerts with dramatic and visual elements, which in many instances provide an historical context for our music. Each year The Toronto Consort offers a subscription series in Toronto, presented in the beautiful acoustic of the recently renovated 700-seat Jeanne Lamon Hall, at the Trinity-St. Paul’s Centre in downtown Toronto. We also tour regularly, having been to Europe and Great Britain four times, and frequently across Canada and into the US.

Recently, the ensemble has been called upon to produce music for historical-drama TV series, including The Tudors, The Borgias and The Vikings, all produced by the cable network, Showtime. Also, The Toronto Consort recorded the soundtrack for Atom Egoyan's award-winning film The Sweet Hereafter.

THE TORONTO CONSORT ARTISTIC ASSOCIATES
Michele DeBoer soprano
David Fallis Artistic Associate
Ben Grossman hurdy-gurdy, percussion
Katherine Hill soprano, viola da gamba, nykelharpa
Cory Knight tenor
Paul Jenkins tenor, harpsichord, organ
Esteban La Rotta lutes, guitars
Alison Melville flutes, recorders
John Pepper bass
Laura Pudwell alto

ADMINISTRATION
Michelle Knight Managing Director
Adam Thomas Smith Director of Audience Engagement and Education

BOARD OF DIRECTORS
Heather Turnbull President
Harry Deeg Treasurer
Frances Campbell Secretary
Jason Bernardon
Jennifer Bryan
Tiffany Grace Tobias
Anita Nador
Andrew Whitehead
PROJECT BACKGROUND

The Toronto Consort's, board, artistic and operational staff have identified the need to make the organization's digital vision a priority and imbed it into the organization's strategic plan. As Canada's leading early music ensemble specializing in repertoire from of the Middle Ages, Renaissance, and Early Baroque, The Consort is well positioned to create digital strategies that support the research, development, and presentation of our main stage and educational programming and recording. In an effort to expand our local and global audiences, while providing deeper and more meaningful opportunities for audience engagement, we are looking to create an effective digital footprint to build legacy and promote the enjoyment of this truly remarkable repertoire.

While the majority of our activities and services are not delivered digitally, we believe that there is an opportunity to identify and launch digital activities that will allow us to share our offerings (ie. concerts, education programs, lectures, and recordings) with a broader audience.

The Consort's current digital activities are limited: pre-concert lectures posted on YouTube, creation of limited video content, marketing social media posts, recordings available on itunes and music streaming services. In November 2017, The Consort partnered with Ludwig Van Toronto to live stream a concert on Facebook. During the live stream, we reached 2,000 viewers (compared to 600 in-person audience.) The results of the streaming opportunity opened up our internal discussion to further explore digital strategies.

The Consort has collected data on our existing customers via Environics Research, surveys, and Tessitura data collection. However, our engagement with our target audience is generalized across audiences. Through audience surveys and email newsletter content analysis, we believe that The Consort's audience is looking for ways to learn more about our offerings. Our content-rich emails have average open rates of 42% and a CTR of 16%, which are well above the industry average rates (16.36% open rate, CTR 6.29%). This leads us to believe that our audience is hungry for more digital engagement. The project would include conducting an audience survey to confirm this assumption. We believe education is a key component to attracting new audiences by providing the historical, visual art, and music connections that make us easier to find online and find potential audiences.
1. Letter of Introduction
   a. Provide a summary of why you or the agency is a good fit with The Toronto Consort.

2. About You
   a. Tell us about yourself or the agency
   b. Outline your relevant experience.
      i. Consultants: please attached your resume.
      ii. Agencies, please outline your services and how they will benefit The Toronto Consort
   c. Biography/ies of yourself or team.

3. Examples of Relevant Experience
   a. Provide examples, case studies, of previous relevant work

4. Budget Breakdown
   a. Referring to the Schedule of Fees, breakdown the project budget
PROPOSED TIMELINE

This proposed timeline is the project outline included in the grant application. The Toronto Consort is open to discussion.

**Request for Proposal Process**
- April 23, 2019 – RFP circulated
- May 3, 2019 – RFP closes
- May 3 – 10, 2019 – RFP proposal review
- May 10 – Shortlisted applicants notified.
- May 13 – 17, 2019 – Shortlisted applicants interviewed
- May 27, 2019 – Notification of Selection

**Phase 1 – Digital Maturity Assessment**
- June 10, 2019 – Kick off meeting
- June 17 – 21, 2019 - Research (includes stakeholder interviews)
- June 24 – 28, 2019 - Review of Consort digital assets and data, industry research
- July 2 – 19, 2019 – Report draft
- July 22 – Report presented to staff

**Phase 2 – Digital Needs Assessment**
- Aug. 12 – Sept. 16, 2019 - Meetings and discussions to review the Digital Maturity Assessment
- Sept. 23 – Oct. 28, 2019 – Draft potential opportunities, priority digital skills, identify digital goals, including potential audience surveys
- Nov. 4 - Dec. 2, 2019 – Internal review of potential opportunities, priority digital skills, digital goals with staff, board
- Dec. 9 - Dec. 16, 2019 – Edits to report

**Phase 3 – Digital Strategic Plan**
- Jan. 13 – Feb. 17, 2020 - Meetings and discussions to review the Digital Needs Assessment to identify where the organizations wants to be and how to get there
- Feb. 24 – Mar. 23, 2020 - Draft of the digital vision, guiding principles, priorities, action plan
- Mar. 30 – Apr. 13, 2020 – Internal review of draft of the digital vision, guiding principles, priorities, action plan with staff and board.
- Apr. 20 - Apr. 27, 2020 - Revision and final approval of digital strategic plan.
**PROPOSED SCHEDULE OF FEES**

Project budget is fixed. All budget fees must include incidentals (travel, accommodation, printing, telephone, etc.). The Toronto Consort has a separate budget for room rentals and survey software.

<table>
<thead>
<tr>
<th>Project Phase</th>
<th>Budget</th>
<th>Instalment 1</th>
<th>Instalment 2</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Professional services fees - external</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Consultant - Phase 1 – Digital Maturity Assessment</td>
<td>$5,400</td>
<td>50% on June 10, 2019</td>
<td>50% on July 22, 2019</td>
</tr>
<tr>
<td>Consultant - Phase 2 – Digital Needs Assessment</td>
<td>$10,800</td>
<td>50% on August 12, 2019</td>
<td>50% on Dec 1, 2019</td>
</tr>
<tr>
<td>Consultant - Phase 3 – Digital Strategic Plan</td>
<td>$15,000</td>
<td>50% on January 13, 2020</td>
<td>50% on April 20, 2020</td>
</tr>
</tbody>
</table>
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*

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**

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

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!*
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

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

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.

### Key Digital Categories

<table>
<thead>
<tr>
<th>Vision</th>
<th>The goals you have for the digital future of your organization</th>
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</thead>
<tbody>
<tr>
<td>Activities and Services</td>
<td>How you use digital to perform activities or deliver services to your target audience</td>
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<tr>
<td>Target Audience</td>
<td>How you use digital to get information about your target audience (the groups of individuals that you serve)- their digital expectations, preferences, and behaviours</td>
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<td>Technology</td>
<td>How you currently use technology for processes and activities, and the type of technology you use</td>
</tr>
<tr>
<td>People and Organization</td>
<td>How you enable your people to use digital tools and encourage new technology in your organization</td>
</tr>
</tbody>
</table>

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!*
| 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.

<table>
<thead>
<tr>
<th>Category</th>
<th>Current State</th>
<th>Future Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vision</td>
<td>Preliminary: Digital vision somewhat developed; strategic plan refers to digital, but not as a priority</td>
<td>Advanced: Digital vision is clearly outlined; strategic plan outlines how digital plays an important role</td>
</tr>
<tr>
<td></td>
<td>Moderate: Activities and services are often delivered digitally</td>
<td>Advanced: Activities and services are nearly always delivered digitally</td>
</tr>
<tr>
<td></td>
<td>To Discover: Data is not collected on the target audience</td>
<td>Moderate: Data is captured on the target audience</td>
</tr>
<tr>
<td>Activities and Services</td>
<td>Preliminary: Engagement is heavily paper-based and generalized across audiences</td>
<td>Moderate: Engagement is often using digital channels and often tailored to different audiences</td>
</tr>
<tr>
<td>Target Audience</td>
<td>Preliminary: The voice of the audience is sometimes considered when developing activities and services</td>
<td>Moderate: The voice of the audience is often considered when developing or changing activities and services</td>
</tr>
<tr>
<td>Development</td>
<td>Moderate: Processes and delivery often use technology; advanced technology is sometimes used</td>
<td>Moderate: Processes and delivery often use technology; advanced technology is sometimes used</td>
</tr>
<tr>
<td></td>
<td>Advanced: Employees excellent with digital tools; new technology is always encouraged in the organization</td>
<td>Advanced: Employees advanced with all digital tools; new technology is always encouraged</td>
</tr>
<tr>
<td>Technology</td>
<td>To Discover: Processes are not in place to protect data or information</td>
<td>Preliminary: Processes are somewhat in place to protect information</td>
</tr>
<tr>
<td>People and Organization</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Security</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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

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).

<table>
<thead>
<tr>
<th>Vision</th>
</tr>
</thead>
<tbody>
<tr>
<td>How you want to use digital to support ‘what you aspire to be’ as an organization</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Guiding Principles</th>
</tr>
</thead>
<tbody>
<tr>
<td>The beliefs and values that guide your decision-making when it comes to your digital vision</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Priorities</th>
</tr>
</thead>
<tbody>
<tr>
<td>The goals you have for digital – what you want to focus on within your organization.</td>
</tr>
</tbody>
</table>

Consider these six dimensions when you are thinking about your priorities.

<table>
<thead>
<tr>
<th>Activities and Services</th>
<th>Audience</th>
<th>Channels</th>
<th>People</th>
<th>Process</th>
<th>Technology</th>
</tr>
</thead>
<tbody>
<tr>
<td>The way you use digital to deliver activities and services</td>
<td>The groups of individuals that you serve</td>
<td>The digital platforms used to deliver your services</td>
<td>Your employees, who help to deliver and manage digital</td>
<td>The policies and procedures that help to enable digital</td>
<td>The underlying technology within your organization</td>
</tr>
</tbody>
</table>
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**

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

**Action Plan**

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

**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.