

The Arts Finance Cohort Technology Assessment Request for Proposal

Organizational and Project Overview

The Arts Finance Cohort (AFC) is a group of five Pittsburgh-based arts organizations including Contemporary Craft (CC), The Pittsburgh Glass Center (PGC), The New Hazlett Theatre (NHT), PICT Classic Theatre (PICT) and Union Project (UP).

The AFC's goal is to provide a high level of strategic and financial expertise to its members and develop a sustainable model of collaboration that brings increased financial sophistication to mid-sized arts organizations in Pittsburgh.

This project will utilize a shared Technology Consultant (TC) to conduct initial assessments, identify improvements, and implement solutions at each organization.

The purpose of this project is to provide the five participating organizations with additional capacity and technology expertise that they would not be able to afford individually. Building upon the success of the Arts Finance Cohort's shared CFO position, this project follows a similar model of collaboration that will bring sustainability through increased technology infrastructure and improvements to the five arts organizations.

Scope of work

This Technology Assessment is the starting point for ongoing technology maintenance and improvement for each organization within the AFC. A comprehensive assessment will set the stage for future projects resulting in streamlined procedures, updated technology infrastructure, and more robust engagement and analytic tools that enable all organizations to understand constituents more fully and form more authentic and impactful relationships, quickly and accurately report out to stakeholders, monitor and analyze organizational growth goals, and more efficiently manage day-to-day business.

Anticipated Deliverables

Initial assessment:

Staff will work with the TC to identify tasks technology is currently being used for, how to run those tasks more efficiently, and additional tasks that could be streamlined through technology solutions. Based on this assessment, the TC will determine areas to invest in solutions, streamline operations, improve data collection, and enhance the customer experience.

- Comprehensive study of each organization's current technology status and needs.

Ongoing consulting:

The initial assessment will determine necessary improvements and explore priority options for each organization individually as well as shared benefits to all organizations. Examples of projects include:

- Relationship mapping to inform database structure and marketing decisions.
- Improving data driven decision making by best utilizing available databases and CRMs, improve data management to streamline data analysis, and assess potential CRM improvements.
- Identifying new CRM options and solutions.
- Development of data analysis reports for education, events, fundraising, subscriptions, individual donors, and corporate sponsorship initiatives.
- Consultation on hardware needs, replacement plans, and preventative maintenance. (Software, PCs, laptops, servers, and other devices.)
- Debate whether physical servers or the cloud will best serve the organization and its staff.
- Website rebuilds or enhancements to current sites.
- Integrating websites with CRMs.
- Identifying opportunities and software solutions to improve how pertinent program data is collected – everything from load-in and performance schedules, to equipment and labor requirements, to marketing copy – and disseminate it throughout the organization.
- Finding solutions to effectively link multiple departments within organizations.
- Writing IT plans including back up, disaster recovery, best practices, etc.
- Provide written and electronic report including findings and recommendations.

Objectives:

1. Drive efficiency.
Technology will be used to streamline staff workflow and build more robust analytic outputs. This will also leverage combined knowledge and lessons learned.
2. Improve constituent engagement and experience.
Leverage each organization's current knowledge, lessons learned, and skill sets in constituent engagement to benefit and improve communication and experience.
3. Strengthen and advance technology infrastructure.
To ensure long term success and sustainability, each organization will assess and plan for improvements in software and hardware updates and maintenance.

Timeline

Project deadlines:

- Proposal submitted by October 27, 2017
- Consultant hired by November 30, 2017
- Initial assessment December 2017 – February 2018
- Ongoing consulting begins in March 2018 and will continue for four-eight months depending on the work identified and the project budget.

Proposal Requirements

Proposals should be as thorough and detailed as possible and include the following:

- General Qualifications and Expertise:
 - Describe your organizational structure (Individual, company, collective, etc.) and history.
 - List your project team's members and qualifications.
 - Describe your capability to assess and consult for multiple organizations simultaneously while prioritizing resolutions and identifying possibilities for shared solutions.
 - List and describe at least three examples of work performed for similar organizations you've previously implemented.
 - Describe your ability to provide additional resources in response to assessment findings.
- Project Understanding:
 - Describe your understanding of the project and the benefits to a technology assessment.
 - Describe your approach to technology consulting and how you will meet project needs.
 - Respond to the proposed timeline, offer any feedback, and describe your approach to ensure deadlines are met.
- Pricing Schedule:
 - List your pricing for the initial assessment and ongoing consulting.
 - Provide details for any additional, estimated fixed and variable expenses.

Submit all proposals electronically by 11:59 pm on October 27, 2017 to Michelle Clesse at michelle@unionproject.org.