

**SHAPING THE FUTURE**

**McINTOSH GALLERY**  
Western University

**Request for Proposal (RFP)**  
for the supply of

**Consulting Services**  
for  
**Strategic Plan, Site Feasibility Study, and Business Plan**

**CLOSING DATE:** Time: 11:59pm Local Time  
Date: Friday, August 2, 2024

**SUBMIT TO:** Lisa Daniels, Director  
[ldanie2@uwo.ca](mailto:ldanie2@uwo.ca)  
519-661-2111 ext. 84602

**SUBMIT VIA:** WeTransfer

**PROJECT DURATION:** September 2024 – August 2025

## SUBMISSION & GENERAL INFORMATION

Proposals must be on the response forms provided and submitted electronically via we transfer. Proposals submitted after the stated closing time will not be considered and will be deleted.

Proposals must be sent via: WeTransfer

Proposals must be sent to: Lisa Daniels, Director, [ldanie2@uwo.ca](mailto:ldanie2@uwo.ca)

Proposals must be clearly labelled:

Shaping the Future  
McIntosh Gallery  
<Applicant Name>

All Proposals received must remain valid for up to 90 days beyond the closing date.

## ACCEPTANCE AND AWARD OF CONTRACT

The McIntosh reserves the right to accept any proposal, in whole or in part, that it feels most fully meets the selection criteria. The lowest cost or any Proposal may not necessarily be accepted.

### SALES TAXES

Proposed prices shall clearly show all applicable H.S.T. (Harmonized Sales Tax).

### CLARIFICATION

Should a proponent find discrepancies in or omissions from the RFP documents, or should there be any doubt as to their meaning, contact Lisa Daniels via email at [ldanie2@uwo.ca](mailto:ldanie2@uwo.ca). Should a correction, explanation, or interpretation be necessary or desirable, a written addendum will be issued. Addendums issued during the bidding period are part of these Proposal Documents.

**Questions regarding this Request for Proposal (RFP) will be accepted from proponents up to and including Wednesday, July 24, 2024.** The McIntosh will provide responses, via email, to all proponents by **Friday, July 26, 2024.** Questions received after the stated deadline will not be responded to. Addenda issued during the period prior to the closing date of the RFP are to be considered part of these Proposal Documents.

## **RESERVATIONS**

The McIntosh reserves the right to accept any Proposal in whole or in part thereof judged most satisfactory, without liability on the part of the McIntosh or Western University.

The McIntosh reserves the right to reject any or all Proposals. The lowest cost Proposal will not necessarily be awarded a contract.

The McIntosh reserves the right to enter into negotiations with the highest scoring proponent using the selection criteria. The McIntosh further reserves the right to negotiate with any other proponent should negotiations with the highest scoring proponent not result in a satisfactory agreement.

Proposals that are incomplete, conditional, or obscure, or which contain additions not called for, erasures, alternations, and irregularities of any kind may be rejected.

## **QUALIFICATIONS OF PROPONENTS**

The McIntosh requires that all proponents provide satisfactory evidence that they have the qualifications, ability, experience, capital, and plan to enable them to prosecute and complete the contract successfully. The bidder must be authorized to do business in the Province of Ontario.

## **PRICES AND BUDGETS**

The McIntosh has a strictly defined budget for the product to be supplied within this Contract and reserves the right to change the scope of this Contract to bring the Proposal price within the available budget limits. Should it be determined that the changes in the scope of the Contract are of sufficient magnitude, then the McIntosh shall cancel the Proposal call. Then, at its discretion, the McIntosh will commence a new process in order to complete the project within the budget available.

Changes to the scope of this Contract, either by changes in scheduling, changes in quantities and/or deletion of any part of the product requirements shall not entitle the Contractor to any extra compensation.

## **PAYMENT**

Upon the successful completion of any phase of the work described herein, the successful proponent will be entitled to payment of the agreed upon price. Subject to any discrepancies or deficiencies, the McIntosh shall pay 100 percent of the agreed upon amount within 30 days of the receipt of an invoice.

## **OTHER INFORMATION**

The McIntosh reserves the right to require proponents to produce any of the following:

- Appropriate insurance certificates
- WSIB clearance certificate
- Financial and corporate information
- Other additional assurances or protections deemed necessary by The McIntosh or Western University

## **OWNERSHIP AND FREEDOM OF INFORMATION**

The information submitted in response to this RFP will be treated in accordance with the relevant provision of the *Freedom of Information and Protection of Privacy Act*. The information collected will be used solely for the purposes stated in the RFP. The proponent does, by the submission of a proposal, accept that the information contained in it will be treated in accordance with the process set out in the RFP.

Proponents should clearly indicate in their submission which parts, if any, are exempt from disclosure under the *Freedom of Information and Protection of Privacy ACT*.

## **RIGHT TO AMEND REQUIREMENTS**

Upon awarding the contract, based on the information submitted in proposals received, the McIntosh reserves the right to work with the successful proponent to modify any of the proposal components outlined in the RFP that are agreeable to all parties. In the event that the chosen supplier fails to act in good faith by refusing to negotiate, or fails to fulfill the intent of the RFP, or to execute any negotiated agreement within five business days of the award, the supplier will be considered to have abandoned all rights and interest in the contract award and the award may be cancelled without penalty. The award may then be made to the next highest ranked proponent, or all proposals may be rejected at the sole discretion of the McIntosh.

## **RIGHT TO DENY BIDDING ON FUTURE REQUESTS FOR SERVICE**

The McIntosh reserves the right to deny any successful bidder the right to respond to any future request for Quotation, Tender or Proposal in the event of poor performance. For greater clarity, the McIntosh will monitor the performance of any successful bidder and shall provide written notice of any deficiencies of service. Should deficiencies be persistent or of a significant nature, in addition to the right to terminate the contract, the McIntosh will advise the successful bidder that their poor performance has rendered them ineligible to compete for similar future requirements on any McIntosh initiative.

## **LIMITATION OF LIABILITY**

The McIntosh enforces a strict code of ethics and attempts to always be fair in evaluating and awarding contracts resulting from any bidding process. By submitting a quotation, bidders agree that the McIntosh will not be held liable for any amount in excess of the amount required to prepare and submit a quotation in the event that the McIntosh is found to have erred in any manner in the award of the contract.

## **PRESENTATION**

When requested by the Director, Proponents may be required to prepare a short presentation that highlights their proposal. This presentation may include a demonstration of the Proponent's proficiency in the service to be provided.

## **MINIMUM CONTRACT REQUIREMENTS**

### **INSURANCE**

A certificate of insurance or a certified copy of the contractor's policy shall be provided showing coverage for at least the following limits:

- i) Comprehensive liability insurance providing bodily injury limits of at least \$2,000,000 (two million dollars) per person and accident and providing for property damage of at least \$2,000,000 (two million dollars) in any one incident.
- ii) The liability insurance shall be endorsed to provide that the policy or policies will not be altered, cancelled or allowed to lapse during duration of the Contract without 30 days prior written notice to the McIntosh.
- iii) The insurance policy shall not contain any deductible amounts and shall remain in effect until the work has been accepted and the contract is terminated.
- iv) The McIntosh shall be added as an additional insured party, in regard to all work associated with this contract.
- v) Professional Liability insurance in the amount of \$2,000,000 (two million dollars).

### **WORKER'S SAFETY INSURANCE**

It is the obligation of any successful bidder to comply with all requirements of the *Workplace Safety and Insurance Board Act*. Bidders must certify that all employees, officers, agents and sub-contractors are covered or exempt under the *Act*. A WSIB certificate shall be supplied at the time of contract signing and updated every 60 days in compliance with the *Act* unless an exemption is evident. Failure to supply or update this certificate as required is cause for termination of the contract.

## PURPOSE

The purpose of the Request for Proposal is to select a consultant who will work in collaboration with the McIntosh Director to develop an integrated and progressive plan that will guide all aspects of the artistic, organizational, financial, and facility initiatives of the McIntosh over the next five (5) years.

The project will consist of three phases: a five-year strategic plan aligned with the *Towards Western at 150 Strategic Plan* (<https://strategicplan.uwo.ca/>) as well as current (and future) university gallery and sector trends; a feasibility study that will assess between three and six possible locations and configurations for a new site for the McIntosh; and a business plan for the top one (or two) possible sites that score the highest in the feasibility study.

The result will be a comprehensive strategic and business plan for the McIntosh Gallery developed in consultation with its artistic, cultural, institutional, economic, political, and community partners. The goal is to develop a plan in a way that:

- provides space for conversations on issues that matter to the lives of our general audiences, artists, students, volunteers, key stakeholders, and employees.
- is inclusive, responsive, and reflective of the communities we serve.
- will increase diversity, broaden awareness, and foster an equitable and inclusive culture.
- reflects ongoing trends in institutional changemaking within the museum and gallery sector.
- positions the McIntosh to be open to a myriad of forms that the institution might adopt to grow and transform through diversity of participation and inclusion with accessibility in mind.

## BACKGROUND

McIntosh Gallery is a university-based, public art gallery established in 1942. The gallery collaborates with artists, curators, students, academics, and community partners to develop innovative strategies to interpret and disseminate art and visual culture. Exhibitions, educational programs, and special events provide a platform for engagement with visual art and artists. With a permanent collection of over 4,000 works, the McIntosh Gallery is a centre for the exploration and presentation of innovative and relevant practices and research in the fields of art history and contemporary visual art. The gallery is committed to serving the students, faculty, and staff of Western University and the broader community of the City of London. Ongoing programs and services actively promote innovative projects in the production, exhibition, interpretation, and collection of art and visual culture.

## SCOPE

The consultants, working in close collaboration with the McIntosh Director and gallery staff, will develop a framework to guide all aspects of the artistic, organizational, financial, and facility initiatives of the McIntosh Gallery over the next five (5) years.

The scope of work includes three, interconnected components.

1. A five-year strategic plan aligned with *Towards Western at 150 Strategic Plan* as well as current (and future) sector trends.
2. Informed by step one, a feasibility study that will assess between three (3) and six (6) possible locations and configurations for a new site for the McIntosh.
3. Based on the results of steps one (1) and two (2), a business plan for the top one (or two) possible sites that score the highest in the feasibility study.

The process by which the plan is developed and executed is of equal importance to the final report. As the sector continues to adjust to the impacts of a global pandemic, the need to rethink our institutional structures and practices is paramount. This requires that we view our institutions through a different and dynamic lens. To do this, we must engage in creative and innovative processes that facilitate an openness to consider and create new operational models in a way that compels us to rethink what we do, who we do it for, and how we do it.

*The task of the moment is not to seek to welcome the other and the excluded into these fragile spaces [galleries], i.e. filling quotas and exacting hastened inclusion policies without making any other changes to institutional culture or structure...The task is to commit to practices of knowing and care that critically interrogate the fraught history of museums and their contemporary form, uprooting weak foundations and rebuilding upon new, healthy ones.* <sup>1</sup>

The *Shaping the Future* project will include but may not be limited to:

- a plan that will guide and empower by articulating key strategic directions, and practical steps to navigate the next five (5) years.
- a facility/physical plant and technology review.
- a feasibility study assessing between three (3) and six (6) potential sites for a new location.
- a two (2) year business plan to ensure sufficient resources are available when needed, including recruitment, professional development requirements, overall operations and implementation of a reimagined artistic vision and program.
- a practical scenario planning framework to ensure we have the tools to anticipate and adapt to the dynamics of a rapidly changing future as we move through the plan.
- A methodology and template to track and measure progress.

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<sup>1</sup> Umolu, Yesomi. *On the Limits of Care and Knowledge: 15 Points Museums Must Understand to Dismantle Structural Injustice*. Arnet. June 25, 2020. Accessed on Sept. 9, 2020 <https://cimam.org/news-archive>.

The consultant will provide direction, guidance, and support to the Director and gallery staff throughout the *Shaping the Future* project. Required support may range from general guidance to resolving major blocks or conflicts, and may include but not be limited to:

- presentation of best practices and model outcomes as experienced in university public art galleries and communities of similar scale.
- attendance at scheduled meetings (approx. 3-4) or be available via Zoom throughout the process when required.
- be available to communicate process and findings to participants, key stakeholders, and the broader community as required.

The consultant will provide the following services toward the development and completion of the *Shaping the Future* project. Services will include but may not be limited to:

### **Phase 1: Review & Planning**

After reviewing all appropriate internal documents, the consultant will facilitate a planning session(s) with the Director, staff, and steering committee. The session will include but not be limited to:

- a review of McIntosh's current mandate, practices, systems of delivery, and the physical plant.
- an environmental scan anticipating population growth, as well as economic, social, sector, and cultural shifts.
- a SWOT analysis identifying McIntosh's strengths, weaknesses, existing challenges and future opportunities.
- the provision of necessary training for McIntosh staff to assist with the strategic planning process.
- the production of a planning document, capturing key findings.

### **Community Engagement Strategy Development**

Working closely with the Director and gallery staff, develop, and design the process and the production of all final and follow-up documents. This phase will include but may not be limited to:

- Design and develop a community and stakeholder engagement plan that is accessible, inclusive, creative, and productive, where all participants are invited to connect, share, and contribute in a meaningful way.
  - Identification of strategies to engage different demographic groups that are currently unengaged or underrepresented through creative, innovative, and artistically centered processes, in addition to traditional information gathering strategies.
  - Development of a clear process and communication strategy which includes practical steps around the types of communication needed for



- successful engagement and implementation.
- Delivery of a kick-off and wrap-up plan.
- Development of processes to help identify and understand assumptions and/or perceptions of those who are impacted by policy, procedure, programs or decisions.
- Design of highly participatory community engagement events that foster discovery and connection, explore possibility, and produce measurable and attainable results.

**(Phase 1 Estimated Completion Timeline: September / October 2024)**

**Phase 2: Community Conversations and Action Plan:**

Phase 2 will provide the necessary information for the consultant to develop a progressive and forward-looking strategic plan, site feasibility study, and business plan. This phase will include but may not be limited to:

- the facilitation of a community discussion/event to "kick off" and introduce the process and generate enthusiasm.
- implementation of various information gathering strategies developed in the previous phases with identified groups and individuals.
- identification of three (3) to six (6) potential sites for the new location of the gallery.
- the production and dissemination of a "what we heard" document capturing all relevant findings and recommendations, ensuring the process accurately captures and interprets input from various groups and individuals.

**(Phase 2: Estimated Completion Timeline: November 2024 - March 2025)**

**Phase 3: Site Feasibility Study**

Undertake a needs and space assessment to realize new vision as identified through the community engagement process (Phase 2), discussions with the steering committee representatives, and a review of possible sites.

- Development of a detailed site assessment methodology with clearly identified criteria and scoring system that indicates how important the various criteria are relative to one another, and which factors would be considered when evaluating any given site based on that criterion.
- Based upon the results of the site assessment analysis and further discussions with the Director, gallery staff, and the steering committee, identify up to three (3) options for the gallery relocation and expansion. Options might include the expansion of the existing site, the renovation of other available site(s), and relocation and renovation within an existing university building.
- Develop scenarios for each option taking into consideration space requirements, accessibility, realization of vision, and costs (capital and operational).

**(Phase 3: Estimated Completion Timeline: April – May 2025)**

## **Phase 4: Production and Communication of Final Documents**

At the conclusion of Phase 3, the consultant will write and present the following documents: Strategic Plan, Site Feasibility Study, and Business Plan based on an agreed upon format. The report will include but may not be limited to:

- identification of key strategic directions including:
  - a series of recommendations with short and long-range goals that, together with smart partnerships and collaborations, consider and/or engage all levels of government, the private sector, students, artists and equity deserving groups, and will allow the McIntosh to realize its full potential and meet the needs of a growing and changing community and sector.
  - identification of appropriate and meaningful cultural indicators and benchmarks including a scenario planning process.
- a review mechanism that will allow the McIntosh to report achievements, identify challenges and determine new priorities.
- Formulation of a one-page Strategic Map
- Feasibility study report providing an overview of process and results including a site recommendation based on results, including a capital cost estimate.
- Two-year projected operating business plan for the recommended site.

**(Phase 4: Estimated Completion Timeline: June - August 2025)**

## **TIME SCHEDULE**

Only consultants who have the capacity to commence work on the project by mid-September 2024 should respond. Assuming that the successful proponent will be notified no later than August 23, 2024 proponents must provide a Work Schedule that provides dates for each of the following phases of the project:

- Kick off meeting with Gallery Team: **September 9, 2025**
- Phase 1
- Phase 2
- Phase 3
- Phase 4
- Presentation to committee and key stakeholders

**MAXIMUM BUDGET: \$90,000 CDN. excluding HST**

## SELECTION CRITERIA

All proposals received will be evaluated using the following weighted criteria:

### PROPOSAL EVALUATION AND WEIGHT FACTORS

#### PRODUCT/PROJECT QUALITY WEIGHT FACTOR

Company Experience and Qualifications*	20
References – quality and relevance of projects	15
Previous Experience	15
Methodology	10
Schedule	10
Project Team	10
Value Add	5
Sustainability	5
Pricing, including all associated expenses	10
<b>TOTAL</b>	<b>100</b>

It is the intent that these criteria be used in evaluating the proposals received; however, the McIntosh Gallery or its assigned agent(s) shall be the sole judge as to the evaluation of the proposals received. No correspondence shall be entered into regarding the evaluation of any proposal or its comparison to other proposals received. The McIntosh also reserves the right to alter or adjust the selection criteria should it be deemed necessary. The McIntosh is not bound to select the proponent with the highest evaluation.

#### \*Qualifications

The respondents have the following proven skills, abilities and experience:

- Strategic Planning within a Public/University Art Gallery framework in similar communities
- Architectural/Planning experience with Category A gallery spaces
- SWOT methodology
- research, critical analysis, and synthesizing skills
- report writing and editing
- facilitation
- communication and listening skills

## NOTES TO PROPONENTS

1. Support and resources from the Director, and gallery staff will be on-going throughout the project including event coordination and set up, survey and research support, access to university resources such as the Office of Indigenous Initiatives, Office of Equity, Diversity, and Inclusion, etc.
2. Additional funds are available for a selected number of artist and/or artistic based information gathering sessions which will be developed with gallery staff.
3. Proponents are required to complete all applicable sections in the proposal using the format provided and/or described in the following pages.
4. The total length of the proposal, exclusive of appendices, should not exceed 30 pages.

## SUBMISSION REQUIREMENTS

Proponents are to fill out each section below.

### SECTION 1: General & Contact Information

#### 1.1 Contact Information: Project Administration

Official Name of Proponent	
Operating Name (if different)	
Lead Contact	
Position/Title	
Mailing Address	
City/Town/County/Region	
Postal Code	
Telephone	
Email	

#### 1.2 Partners (if applicable)

Replicate the above format for each Partner.

#### 1.3 Project Description

Provide a brief description of the project and how your company will approach it. (500 words maximum).

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**1.4 Conflicts of Interest**

Proponents are required to state any perceived or actual conflicts of interest that they have with the McIntosh, staff or Western University.

**1.5 Confidentiality**

The information submitted in response to the RFP will be treated in accordance with all applicable legislation regarding freedom of information and privacy. The information collected will be used solely for the purposes stated in the RFP. The proponent does, by the submission of a proposal, accept that the information contained in it will be treated in accordance with the process set out in the RFP. Proponents should clearly indicate in their submission which parts, if any, are exempt from disclosure under the relevant freedom of information and protection of privacy legislation.

**1.6 Use of Materials Provided**

The proponent confirms that all materials provided by the McIntosh have been used only to respond to this RFP.

**1.7 Consent and Certification**

By submitting this application, the lead proponent hereby certifies to the Owners that the application and the supporting documentation are true and complete in all respects. The proponent also certifies that it has read and complied with the terms of the RFP.

Lead Applicants Name: \_\_\_\_\_ Position: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## SECTION 2: Profiles

### 2.1 Company Profile

Provide a profile of the company submitting the proposal. List the length of time in business and principals involved.

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### 2.2 Partner Profile

Where a proposal includes a partnership, similar information should be provided for the partner(s).

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## SECTION 3: References

### 3.1 References

Please provide a minimum of three references for projects in which you have been involved. Under “Role in Project” describe if your organization was the lead agency or a subcontractor, the scale of the project, and the deliverables. Replicate the table as required.

In the case of subcontractors, provide a minimum of two references for each subcontractor.

Contact Name		Organization	
Address		Position	
Postal Code		Telephone	
Email		Fax	
Role in Project			

### 3.2 Previous Experience

Proponents should describe any previous experience in projects similar to that included in the RFP.

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## SECTION 4: Methodology

### 4.1 Approach to Project

Proposals should clearly describe the process that would be undertaken in completing this project and the unique or innovative components that the specific proposal incorporates. Proponents should be explicit in describing the methodology that they will use. Proponents should state the formats of the deliverables.

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### 4.2 Schedule

Proponents will include a schedule which clearly indicates the time required to complete the process as well as identifying critical dates within the process.

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## SECTION 5: Project Team

### 5.1 Project Team Members

Use the following table to list all the Project Team Members. The table may be duplicated as many times as required.

Project Manager		Organization	
Address		Present Title	
Postal Code		Telephone	
Email		Fax	
Role in Project			
Relevant Skills and Expertise to be contributed to the Project			

### 5.2 Project Team Member CV's

Please append a full CV for each Project Team Member at the end of Section 7.

## SECTION 6: Pricing

### 6.1 Pricing

Proponents must provide a schedule of the costs associated with the project including hourly rates/per diem of all individuals involved, disbursements including travel, communications, printing and overhead. Proponents must also provide an upset limit which will be a maximum amount which will be billed in the performance of the work involved in the RFP.

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## **SECTION 7: Sustainability**

**7.1** Proponents should provide details on how they take sustainability into consideration in their business operations, factors could include, resource use and environmental impacts, EDI, local economic development, ethical work practices, workplace safety, etc.

## **SECTION 8: Value Added**

### **8.1 Value Added Services**

Proponents should provide details on any aspects of the proposal that provide additional value or exceed the requirements of the RFP.

Proponents are required to submit one, pdf document via WeTransfer prior to **11:59pm Local Time, Friday, August 2, 2023.**

**Submit to:** Lisa Daniels, Director  
ldanie2@uwo.ca