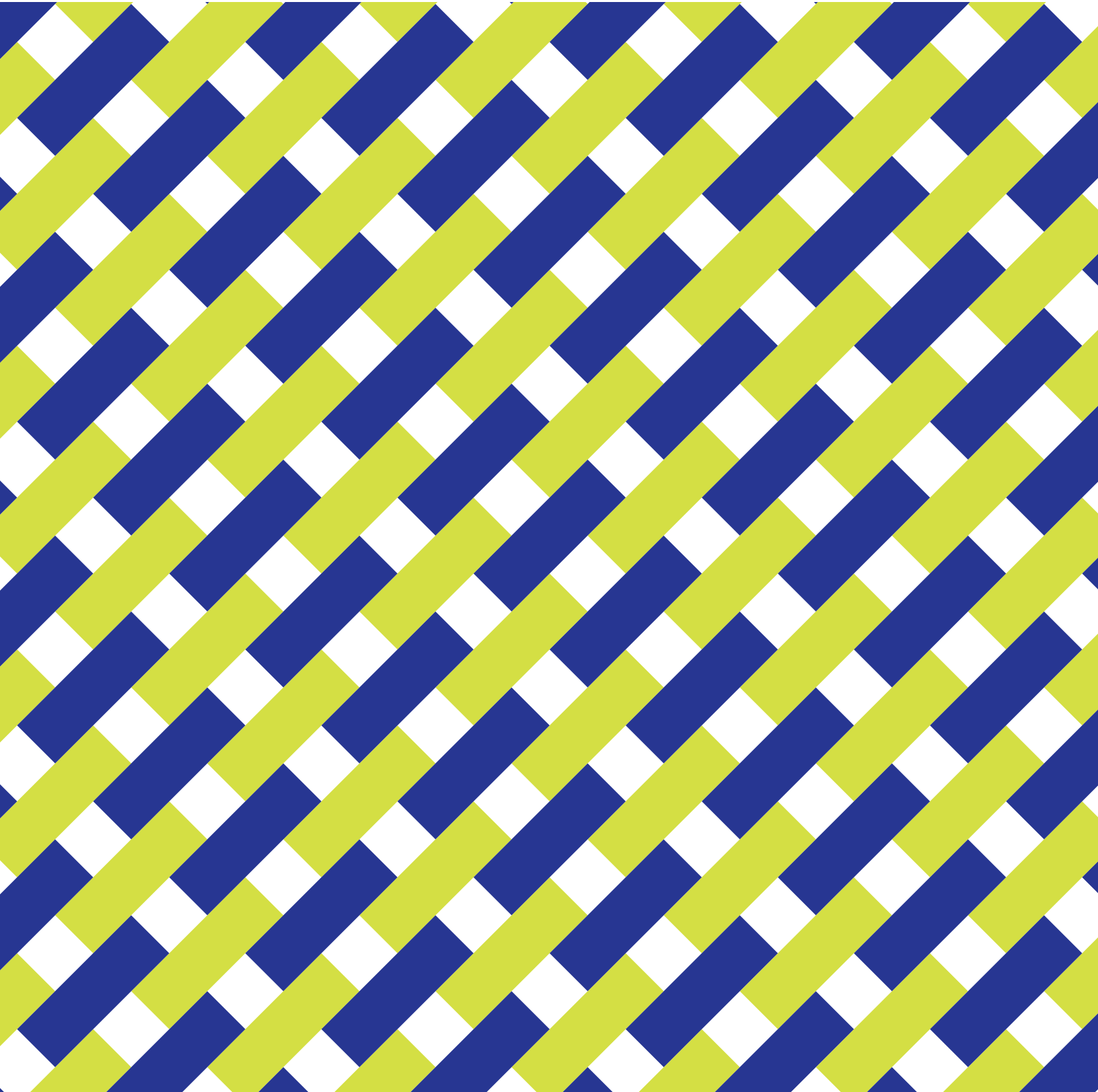


webb

management
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incorporated

building creativity





management
services
incorporated

July 13, 2012

Proposal: Performing Arts Study

Prepared for the

City of Madison

RFP# 8211-0-2012/MM

Due Date: 7/16/2012, 2:00PM

contact:

Duncan Webb

Webb Management Services, Inc.

350 5th Avenue, Suite 4005

New York, NY 10118

t. (212) 929-5040

f. (212) 929-5954

duncan@webbmgmt.org

table of contents

- 1. required rfp forms..... 4
- 2. executive summary..... 10
- 3. qualifications, experience + references. 12
- 4. project approach 29
- 5. cost proposalattached

RFP FORM A SIGNATURE AFFIDAVIT

Note: This form must be returned with your proposal response.

In signing this proposal, we certify that we have not, either directly or indirectly, entered into any agreement or participated in any collusion or otherwise taken any action in restraint of free competition; that no attempt has been made to induce any other person or firm to submit or not to submit a proposal; that this proposal has been independently arrived at without collusion with any other proposer competitor or potential competitor; that this proposal has not been knowingly disclosed prior to the opening of proposals to any other proposer or competitor; that the above statement is accurate under penalty of perjury.

The undersigned, submitting this proposal, hereby agrees with all the terms, conditions, and specifications required by the City in this Request for Bid, and declares that the attached proposal and pricing are in conformity therewith, and attests to the truthfulness of all submissions in response to this solicitation.

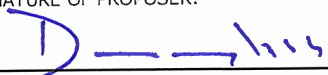
Proposer shall provide the complete information requested below. Include the legal name of the Proposer and signature of the person(s) legally authorized to bind the Proposer to a contract.

Local Preference: (Refer to Section 1.20.8)

We are a registered local vendor
(Mark ONLY if currently registered on
the City website)

Yes *N/A* *DWB*

We intend to register as a local vendor

Proposal Invalid Without Signature	
SIGNATURE OF PROPOSER: 	DATE: July 13, 2012
NAME AND TITLE OF PROPOSER: Duncan Webb, President	COMPANY NAME: Webb Management Services
TELEPHONE: (212) 929-5040	ADDRESS: 350 5th Avenue, Suite 4005 New York, NY 10118
EMAIL: duncan@webbmgmt.org	
Person to Be Contacted If There Are Questions about Your Proposal (if different from above)	
NAME: Duncan Webb	TITLE: President
TELEPHONE: (212) 929-5040	EMAIL: duncan@webbmgmt.org

RFP FORM B RECEIPT FORMS and SUBMITTAL CHECKLIST

RECEIPT OF FORMS.			
The undersigned hereby acknowledges the receipt of the following forms:			
Request for Proposal (Initial all <u>applicable</u> forms)	Initial to acknowledge receipt of RFP Documents	<u>Required Submittals Checklist</u> Initial all submitted documents	
RFP SECTIONS:			
Section 1: General RFP Administrative Information	DMW	[Checkered pattern]	
Section 2: Scope of Services	DMW		
Section 3: Required Information and Content of Proposals	DMW		
ATTACHMENTS			
Attachment A: Sample Contract for Purchase of Services	DMW		
Attachment B: Standard Terms and Conditions	DMW		
Attachment C: Sample Payment Schedule	DMW		
ADDENDA			
Addendum No. <u>1</u> Dated: <u>7/6/2012</u>	DMW		
Addendum No. <u>2</u> Dated: <u>7/11/2012</u>	DMW		
Addendum No. <u> </u> Dated: <u> </u>			

SUBMITTALS CHECKLIST.	
The undersigned hereby acknowledges the submittal of the following forms: (Initial all applicable forms.)	
SECTION 3.3:	
CHAPTER 1: REQUIRED RFP FORMS	
1. RFP FORM A: Signature Affidavit	DMW
2. RFP FORM B: Receipt Forms and Submittal Checklist	
3. RFP FORM C: Contractor Profile	
4. RFP FORM D: Proposer References	
5. RFP FORM E: Designation of Confidential and Proprietary Information	
CHAPTER 2: Company Information	DMW
CHAPTER 3: Qualifications, Experience and Referencex	DMW
CHAPTER 4: Project Approach	DMW
CHAPTER 5: Cost Proposal (Separate Sealed Envelope)	DMW
ELECTRONIC COPY	DMW

PROPOSER: Webb Management Services, Inc.

RFP FORM C

CONTRACTOR PROFILE

Webb Management Services, Inc.

1. **Proposing Company Name:** _____
 2. FEIN 13-3948512 OR (If Sole Proprietorship, provide SSN upon award, if FEIN is N/A)

DUNN AND BRADSTREET NO. 011352262

3. **Form of Organization:** Corporation Limited Liability Company General Partnership
 Sole Proprietor Unincorporated Association Other: _____

4. **Location of Main Office:**
 ADDRESS 350 5th Avenue, Suite 4005 CITY New York STATE New York ZIP+4 10118-4005

5. **Location of Office servicing City of Madison account:**
 ADDRESS 350 5th Avenue, Suite 4005 CITY New York STATE New York ZIP+4 10118-4005

6. **Principal Information and Contact:**
 NAME Duncan Webb TITLE: President
 TEL (212) 929-5040 TOLL FREE TEL None
 FAX (212) 929-5954 E-MAIL duncan@webbmgmt.org

7. **Contact Person about your proposal if different from above:**
 NAME _____ TITLE: _____
 TEL _____ TOLL FREE TEL _____
 FAX _____ E-MAIL _____

8. **Orders and Billing Contacts and Mailing Address:**
 NAME Duncan Webb TITLE: President
 TEL (212) 929-5040 TOLL FREE TEL None.
 FAX (212) 929-5954 E-MAIL ADDRESS duncan@webbmgmt.org
 ADDRESS 350 5th Avenue, Suite 4005 CITY New York STATE _____ ZIP+4 10118-4005

9. **Affirmative Action Contact:**
 The successful Contractor, who employs more than 15 employees and whose aggregate annual business with the City for the calendar year in which the contract takes effect is more than twenty-five thousand dollars (\$25,000), will be required to comply with the City of Madison Affirmative Action Ordinance, Section 3.58(8) within thirty (30) days of award of contract.
 NAME Duncan Webb TITLE: President
 TEL (212) 929-5040 TOLL FREE TEL None.
 FAX (212) 929-5954 E-MAIL duncan@webbmgmt.org
 ADDRESS 350 5th Avenue, Suite 4005 CITY New York STATE _____ ZIP+4 10118-4005

10. **Local Preference Status:**
 The City of Madison has adopted a local preference purchasing policy granting a one percent request for bid or a 5 percent request for proposal scoring preference to Dane County based suppliers. Only suppliers registered prior to the bid's due date will receive the preference. Proposers seeking to obtain local preference are required to register on the City of Madison online registration website:
<http://www.cityofmadison.com/business/localPurchasing/index.cfm>

We are a registered local vendor _____ (Mark ONLY if currently registered on the City website) NYA We intend to register as a local vendor

RFP FORM D

PROPOSER REFERENCES

FOR VENDOR: Webb Management Services

Provide company name, address, contact person, telephone number, and appropriate information on the product(s) and/or service(s) used for four (4) or more installations with requirements similar to those included in this solicitation document. If vendor is proposing any arrangement involving a third party, the named references should also be involved in a similar arrangement.

Company Name Regional Arts & Culture Council

Address (include ZIP) 411 NW Park Avenue, Suite 101. Portland, OR 97209-3356

Contact Person Jeff Hawthorne Phone No. 503-823-5111

Contract Period 2010

Services Provided Performing Arts Venues Assessment: Needs Assessment that considered demand for facilities and services to serve the performing arts sector in the short, medium and long term.

Company Name North Lake Tahoe Resort Association

Address (include ZIP) PO Box 5459, Tahoe City, CA 96145

Contact Person Ron Treabess Phone No. 530-581-8735

Contract Period 2008-2009

Services Provided Facilities Plan for Arts & Culture: Needs Assessment and Operating Plans for infrastructure programs and services to serve arts groups, permanent and seasonal residents and visitors.

Company Name City of Fort Collins, Colorado

Address (include ZIP) Lincoln Center, 417 West Magnolia Street, Fort Collins, CO

Contact Person Jill Stilwell Phone No. 970-221-6735

Contract Period 2006-2007

Services Provided Cultural Facilities Master Plan: Needs Assessment, Site Selection and Business Planning including recommendations on infrastructure and funding strategies.

Company Name San Jose Redevelopment Agency (no longer active)

Address (include ZIP) Not available

Contact Person Tim Bell, former Project Manager Phone No. 415-777-0487

Contract Period 2007-2008

Services Provided Demand Analysis for Small-Scale Facilities in Downtown San Jose & Strategic Business Planning for Three Partner Arts Organizations

RFP FORM D

PROPOSER REFERENCES

FOR VENDOR: Webb Management Services

Provide company name, address, contact person, telephone number, and appropriate information on the product(s) and/or service(s) used for four (4) or more installations with requirements similar to those included in this solicitation document. If vendor is proposing any arrangement involving a third party, the named references should also be involved in a similar arrangement.

Company Name Arlington County Cultural Affairs

Address (include ZIP) 1100 North Glebe Road, Suite 1500, Arlington, VA 22201

Contact Person Norma Kaplan, Former Division Chief Phone No. nkaplan@georgestplayhouse.org

Contract Period 2006, 2010-2011

Services Provided Feasibility Study for Cultural Facilities; Business Planning & Implementation for Cultural Facilities

Company Name Scottsdale Cultural Council

Address (include ZIP) 7380 East 2nd Street, Scottsdale, AZ 85251

Contact Person Bill Banchs Phone No. 480-874-4610

Contract Period 2008-2009

Services Provided Cultural Facilities Master Plan: Needs Assessment & Operational Planning for New & Improved Performing and Visual Arts Facilities to serve the community in the short and long term

Company Name _____

Address (include ZIP) _____

Contact Person _____ Phone No. _____

Contract Period _____

Services Provided _____

Company Name _____

Address (include ZIP) _____

Contact Person _____ Phone No. _____

Contract Period _____

Services Provided _____

RFP FORM E

DESIGNATION OF CONFIDENTIAL AND PROPRIETARY INFORMATION

Proposers are hereby notified that all information submitted in response to this RFP may be made available for public inspection according to public records laws of the State of Wisconsin or other applicable public record laws. Therefore, proposers are encouraged to refrain from submitting information that cannot be open for public inspection. However, if proposers must include information deemed confidential and proprietary by the proposer, proposer must comply with these instructions:

1. Requests for confidentiality must be submitted in writing to the City Purchasing contact prior to submitting a proposal.
2. Requests for confidentiality must use this designated form. Failure to include this form in the bid/proposal response may mean that all information provided as part of the bid/proposal response will be open to examination and copying. The City considers other markings of confidential in the bid/proposal document to be insufficient.
3. Proposers must cite the specific legal justification for such request.
4. Any information to be considered confidential or proprietary must be separated and packaged from the rest of the proposal. Co-mingling of confidential/proprietary and other information is not acceptable.

Prices always become public information when bids/proposals are opened or when negotiations have been completed and the contract has been awarded. Any information that will be included in any resulting contract cannot be considered confidential. A proposal, in its entirety, will not be considered confidential and/or proprietary. Other information usually cannot be kept confidential unless it involves a trade secret as defined in S.134.90(1)(c), Wis. Stats. Trade secret is defined in s. 134.90(1)(c), Wis. Stats. as follows: "Trade secret" means information, including a formula, pattern, compilation, program, device, method, technique or process to which all of the following apply:

1. The information derives independent economic value, actual or potential, from not being generally known to, and not being readily ascertainable by proper means by, other persons who can obtain economic value from its disclosure or use.
2. The information is the subject of efforts to maintain its secrecy that are reasonable under the circumstances.

In the event the designation of confidentiality of this information is challenged, the undersigned hereby agrees to provide legal counsel or other necessary assistance to defend the designation of confidentiality and agrees to hold the City of Madison harmless for any costs or damages arising out of the City's agreeing to withhold the materials.

The attached material submitted in response to Bid/Proposal # 8211-0-2012/MM includes proprietary and confidential information which qualifies as a trade secret, as provided in s. 19.36(5), Wis. Stats., or is otherwise material that can be kept confidential under the Wisconsin Open Records Law. As such, we ask that certain pages, as indicated below, of this bid/proposal response be treated as confidential material and not be released:

Section	Page No.	Topic	Specific legal justification that supports confidentiality of information

Webb Management Services, Inc.

Company Name _____

Authorized Representative  _____

Signature

Authorized Representative Duncan Webb, President _____

Type or Print

Date July 12, 2012 _____

executive summary

introduction

The City of Madison wishes to undertake a study of its performing arts environment, including a review of its performing arts community, facilities, existing and potential audiences and funding scenarios. The ultimate goal of this needs assessment is to understand the facilities, infrastructure and partnerships required to support and strengthen the local performing arts community, allowing it to effectively attract, engage and serve Madison and regional residents.

Webb Management Services is a management consulting practice for the development and operation of arts facilities and organizations, preparing needs assessments, feasibility studies, business plans and strategic plans for communities, buildings and groups of all shapes and sizes. We are pleased to submit a proposal that details our skills, relevant experience, value proposition, approach to this assignment and the specific services we would offer to the City of Madison, intended to guide the Steering Committee and City as a whole towards informed decision-making about the future of its performing arts sector.

qualifications

Webb Management Services is well-positioned to undertake this study process on the basis of our skills, resources, relevant experience, and the personnel we would assign to the assessment. Our firm is one of the nation's leading providers of cultural and project planning services, having completed more than 275 assignments, all of which involve analysis and planning related to cultural facility and arts infrastructure with specific focus on the performing arts. Relevant experience includes performing arts needs assessments, venue assessments and plans for the Cities of Portland (OR), San Jose (CA), Fort Collins (CO), Arlington County (VA), and Scottsdale (AZ.)

Our team includes nationally-recognized experts and practitioners who offer years of experience and perspective on performing arts audiences, issues of supply and demand, facility utilization, and development and operations of arts facilities. We are a small and collaborative firm of management consultants and analysts that have worked professionally in the performing arts industry, with specific experience in operations, business and finance for performing artists, arts organizations and facilities, and with knowledge of (and affinity for) Madison's cultural landscape and facility inventory. For this project, we have teamed with Alan Brown, Principal of WolfBrown, an arts market research and planning firm. Alan has particular knowledge and experience with arts markets and audience behavior and would perform the market assessment scope of work for the Performing Arts Study.

executive summary (continued)

project approach

The services described in this proposal are based on an approach that we have developed and employed successfully within many communities around the country. The collaborative and inclusive nature of our process will be of particular importance for this project, which must consider the perspective of a diversity of constituents while defining needs and strategies to support the performing arts.

The six-month process begins with extensive information collection and analysis that considers five key issues:

- * The health and needs of the local performing arts community;
- * Existing and potential demand on the part of local audiences and residents;
- * The existing inventory of space utilized for performance, rehearsal, arts education, arts creation and otherwise;
- * The goals and priorities of Madison as a community; and
- * The current and potential funding climate and scenario for the performing arts.

Research on comparable communities and facilities helps to inform recommendations around facility needs and opportunities, governance and infrastructure, potential partnerships and sector-wide strategies such as those that address funding and sustainability.

Workshops and input sessions are thread throughout the study process, though the final community input plan would be developed in consultation with the Steering Committee in order to ensure that methodology is appropriate and relevant.

Initial conclusions and recommendations will be shared with the Steering Committee, Madison Common Council and other constituents via a draft report and presentations. Input will be incorporated before the study is finalized and presented.

We employed an extremely similar approach within a 2010 study in Portland, OR and would invite the Steering Committee to contact that reference (as well as others) and review the results of that work, which is available at <http://racc.org/resources/performing-arts-venues-assessment>

cost proposal

A separate cost proposal is attached, as requested in the RFP.

qualifications, experience + references

a. background + history

Founded in 1997, Webb Management Services has completed more than 275 assignments related to performing arts and cultural community development. We work in varying sizes and types of communities in the United States and Canada. With a staff of 4 and one office centered in New York City, our mission is to support preservation, development and delivery in the arts and cultural sector by providing sound planning and services that lead to cultural and community development. Our clients include governments, colleges and universities, arts organizations, development agencies and other entities.

Our assignments and services--the vast majority of which are exclusively dedicated to the assessment, feasibility and operation of arts and cultural facilities and organizations--include consulting, training and research. Additional assignments include organizational assessments, strategic planning, community cultural planning, specific research services and other implementation services. We primarily work in the performing arts sector and have completed hundreds of studies that assess organizations, audiences, facilities and funding scenarios, just like the services requested in Madison. Our expertise is unique in that:

* *We are the only firm in North America so exclusively focused on projects that assess existing operations and/or the potential development and operations of cultural space.* Our network and experience working on more than 275 facility projects means that we are apprised of trends and issues in cultural facility development and management. Much of our experience falls within the public sector.

* *All of our staff are artists, former arts administrators and have been formally trained in business and finance.* We understand the language and aspirations of artists and we have also worked in facilities like those we would be reviewing in Madison and in communities that have dealt with similar issues. In addition, we are all trained in business and finance and have knowledge and experience with cultural and public policy. In fact, one of our staff worked in the arts sector in Madison while attending the Bolz Center for Arts Administration at the UW. Our skills and experience allows us to connect with artists, but also understand the need for accountability, sustainability and fiscal conservancy required by community and political leadership.

* *We effectively integrate facility planning with community cultural planning.* Oftentimes our work identifies policy issues or needs within communities in addition to facility needs, such as the need for new or expanded funding channels or training and services in the performing arts sector. We have also developed comprehensive community cultural facility master plans that address the need for incremental cultural development over time and offer related implementation strategies.

qualifications, experience + references (continued)

* *We provide our clients with important objectivity.* The nature of our practice, services and mission allows us to undertake completely objective studies, as the core of our business is devoted to research and planning, not construction and physical design. Sometimes our analyses suggest that we advocate for the development or redevelopment of arts facilities, other times we find that conditions are not conducive.

b. project team

project partner: For this project, we have partnered with Alan Brown, principal of WolfBrown and an internationally recognized arts audience researcher. Alan adds important perspective and expertise to the market assessment portion of the Performing Arts Study.

Alan's firm, WolfBrown, is an arts research and planning consultancy that helps nonprofit organizations, funders and public agencies accomplish their missions and meet the challenges of change. Since its founding in 1983 as The Wolf Organization, WolfBrown has assisted hundreds of cultural organizations and civic agencies in the United States and abroad in their efforts to manage growth, reinvent and restructure themselves, plan for the future and transform dreams into reality. WolfBrown has earned a reputation for accomplishing large-scale, big-picture projects in the arts sector and are recognized as leading research-based knowledge creators for arts and cultural organizations.

The firm has worked with many of the country's largest foundations and arts agencies, pioneering new approaches to collecting and analyzing data to help them:

- * Overcome challenges and maximize opportunities in the circumstances in which they are working;
- * Assess the goals and impacts of their programs in complex environments, accounting for the influence of a range of other economic, political, social, and strategic elements, including the programs of other funders; and
- * Provide insight and clarity regarding best practices, lessons learned, and recommendations for future programs.

WolfBrown has 16 employees in five offices throughout the US and is a financially stable and successful company with an impeccable reputation, particularly for its work in audience research and engagement. For more information about the firm, its staff, clients, publications and services, visit www.wolfbrown.com.

organizational structure: Duncan Webb (President), Carrie Blake (Senior Consultant) and Liz Bloomfield (Consultant), all full-time staff members at Webb Management Services, will work on this project along with Alan Brown, our affiliate consultant. Duncan Webb will serve as the Project Manager and primary point of contact

qualifications, experience + references (continued)

for the study, and will oversee the other three team members. All assigned personnel are available, ready and willing to complete the services proposed between October 2012 and March 2013. A list of team members, titles, roles and anticipated hours follows.

<u>Team Member</u>	<u>Responsibility</u>	<u>#Hours</u>
Duncan Webb, President	Project Manager	108
Alan Brown, Principal	Performing Arts Audience Assessment	144
Carrie Blake, Senior Consultant	Research, Data Collection, Analysis, Report Narrative	254
Liz Bloomfield, Consultant	Research, Data Collection, Analysis, Support	186

value proposition + resumes: We offer a strong value proposition to the City of Madison on the basis of the following:

* *We have relevant experience.* We have facilitated hundreds of similar studies, many of which were for government entities and located in cities with characteristics and challenges similar to Madison. Most of our work has addressed important arts facilities issues and choices to chart a course for the future. In addition, our international practice and many years of experience have made us big thinkers, able to search for creative solutions from a huge body of knowledge and a diverse network of industry leaders.

* *We are artists and formally trained managers.* Again, each member of our staff has worked professionally in the performing arts sector, as administrative leaders, financial managers, facility managers, producers, presenters, performers, educators and/or fundraisers for arts organizations and performing arts facilities. In addition, we are all trained in business and finance. This combination of skills means that:

- * We effectively communicate and collaborate with artists and arts organizations that use cultural facilities, understanding their creative drive and aspirations; and
- * Our work is credible with business leaders, government leaders, funders and related trustees given our focus on fiscal conservancy, impacts and sustainability.

* *We are true collaborators.* We are fundamentally team players, able and willing to work closely with client groups, developers, project leadership, community residents, and other constituents through planning projects. Each one of our projects involves community engagement, facilitation and collaboration, to varying degrees.

* *We have particular familiarity with Madison.* One of our team members, Carrie Blake, lived and worked in the Madison arts sector while studying arts administration at the UW during the development of the Overture Center. She remains connected to Madison, visiting annually--oftentimes as a cultural tourist--and maintaining many contacts in the cultural and non-profit sector.

Brief resumes for our team members are included on the following pages.

[Webb Management Services Inc.](#)

qualifications, experience + references (continued)



Duncan M. Webb, President, Webb Management Services

Duncan's career in the arts began onstage as a lovesick maiden in a 1969 production of Gilbert and Sullivan's *Patience*. After college, he became a banker, spending seven years in commercial lending and international finance. In 1986, after many years of volunteer work in the arts, he came into the field as a producer of experimental, industrial and commercial theatre, with such credits as the Canadian premieres of *Changing Bodies*, *Children of a Lesser God*, *Blood Brothers*, *Orphans*, *Marshall Bravestarr* and *Barbie and the Rockers*. He also developed marketing and sponsorship programs for the Canadian premiere of *Les Miserables*.

Duncan M. Webb founded Webb Management Services, Inc. to provide management consulting services to the arts and cultural industries. The firm has now successfully completed more than 275 consulting assignments for the development of facilities and districts, and for the advancement of cultural organizations. Examples of assignments include a Performing Arts Venues Assessment for the Tri-County region in Portland, OR, and work with the Lower Manhattan Development Corporation on plans for new performing arts facilities at the World Trade Center Memorial Site.

In 1989, Duncan joined Theatre Projects Consultants as a management consultant, writing feasibility studies for a range of performing arts facilities and ultimately becoming the general manager of the North American practice of this theatre consulting firm. He then spent two additional years at AMS Planning and Research, doing similar work before starting Webb Management Services in March 1997.

A Certified Management Consultant (CMC), Duncan has been an active speaker and published writer on arts management and the development, operation and financing of arts facilities. In January 2005, Webb's book "Running Theaters: Best Practices for Managers and Leaders" was published, the first book ever written on the management of performing arts facilities. He is also a professor in New York University's Graduate Program in Performing Arts Administration, where he teaches Finance and Planning for the Performing Arts and Principles & Practices of Performing Arts Administration.

Duncan has a bachelor's degree in Economics from the University of Western Ontario and a master's degree in Business Administration from the University of Toronto. He currently lives in New York City with his wife and two children.

company biography

qualifications, experience + references (continued)



Alan Brown, Principal, WolfBrown

For 2012, Alan's work will follow several veins. His work on assessing the intrinsic impacts of arts experiences continues to expand and evolve, most recently with the Australia Council for the Arts, the National Endowment for the Arts, and Theatre Bay Area in a national pilot study of audiences at 58 different theatre productions offered by 18 theatres. Throughout 2012 he is working with the Performing Arts Program of the William and Flora Hewlett Foundation on a large-scale pilot program to develop a range of survey methods for better understanding who participates in the arts.

Alan Brown is a leading researcher and management consultant in the nonprofit arts industry. His work focuses on understanding consumer demand for cultural experiences and helping cultural institutions, foundations and agencies see new opportunities, make informed decisions and respond to changing conditions. His studies have introduced new vocabulary to the lexicon of cultural participation and propelled the field towards a clearer view of the rapidly changing cultural landscape.

Jazz audiences are another focus of Alan's work, with the release in 2011 of a major study commissioned by Jazz Arts Group of Columbus, Ohio and a consortium of jazz presenters across the U.S. During the 2011-13 seasons, he will assist the New World Symphony in evaluating innovative concert formats in connection with the opening of its Miami Beach concert hall designed by Frank Gehry. In a related vein, Alan is leading a study to consider what types of facilities are needed to engage Bay Area residents in classical music over the next 30 to 50 years.

Another focus of Alan's work is developing measurement systems that communities can use to reliably and repeatedly track levels of public engagement in arts and culture, including the Philadelphia Cultural Engagement Index and a Province-wide study of arts participation for the Ontario Arts Council. With Jennifer Novak-Leonard, Alan helped to prepare Research Report #54 for the National Endowment for the Arts, *Beyond Attendance: A Multi-Modal Understanding of Arts Participation*, which was released in February 2011.

Customer segmentation remains a thrust of Alan's work, with recent studies for Steppenwolf, Welsh National Opera, Pacific Symphony, South Coast Rep, Major University Presenters (MUP) consortium and Glyndebourne Opera Festival (in partnership with Baker Richards). He is presently working to develop improved methods for incorporating customer preference data from survey research into ticketing databases.

company biography

qualifications, experience + references (continued)

In partnership with Arthur Nacht, Alan is leading a multi-year evaluation of Nonprofit Finance Fund's Leading For The Future initiative, a ground breaking grant program building on the principles of capitalization to transform nonprofit arts organizations, with funding from the Doris Duke Charitable Foundation.

Alan is the founder of CultureLab, a partnership between the Cultural Policy Center at the University of Chicago and an international consortium of arts consultants, who aim to build a bridge between academic research and everyday practice, and to speed the diffusion of promising practice into the cultural sector. He has served on the organizing committee of the National Arts Marketing Project annual conference since its inception, and speaks frequently at conferences in the U.S. and overseas.

Prior to his consulting career, Alan served for five years as Executive Director of the Ann Arbor Summer Festival, where he presented Ella Fitzgerald, Sarah Vaughn and many other artists. He holds three degrees from the University of Michigan: a Master of Business Administration, a Master of Music in Arts Administration and a Bachelor of Musical Arts in vocal performance. Alan resides in San Francisco.

qualifications, experience + references (continued)



Carrie E. Blake

Carrie has gained extensive knowledge on the operation and function of arts organizations through her work with various independent, government-based, and university arts organizations.

Before joining the firm, Carrie was the Associate Producer for the Office of Arts & Cultural Programming at Montclair State University (NJ) where she played a pivotal role in the establishment of an ambitious new presenting and producing program. Collaborating with innovative experimental artists from across the nation and around the world, Carrie coordinated regional, national and world premieres while working to establish identity, presence, structure and policy for MSU's new venture.

Prior to working at MSU, Carrie developed and managed fundraising events and campaigns for both The Drama League, a New York City-based nonprofit committed to developing artists and audiences for the American theatre, and the Madison Museum of Contemporary Art (Madison, WI). While in Madison she also supported the marketing function of the Madison Civic Center as it prepared for expansion to what is now the Overture Center.

Through her Master's Degree in Business at the Bolz Center for Arts Administration, University of Wisconsin-Madison, Carrie completed a venture development business plan for the Wisconsin School Music Association and a marketing research study for the Madison Symphony Orchestra. Her independent graduate research focused on the university arts presenters' multifarious existence within university and community contexts.

Carrie earned a dual BA in Music and Arts Administration from the University of Kentucky. A native of Cleveland Ohio, Carrie's commitment to the arts first began at the age of nine when, after becoming fed up with the antics of her creatively destructive brothers, she picked up her first clarinet.

Carrie Blake joined Webb Management Services, Inc. in January 2006 and has worked on nearly 150 studies involving cultural facility development projects.

At Webb Management Services, Carrie works as a Project Manager and Consultant on projects such as a Demand Analysis for Arts Facilities in San Jose, CA and a Performing Arts Venues Assessment for the Tri-County Region surrounding Portland, OR.

company biography

qualifications, experience + references (continued)



Liz Bloomfield

Liz Bloomfield brings integral knowledge of non-profit finance and accounting to Webb Management Services. She has worked with countless artists and a number of arts organizations to ensure the financial success and stability of creative projects and visions.

Prior to joining Webb Management Services, Liz was the Accounting Officer at New York Foundation for the Arts (NYFA), a leading provider of information, research, and financial support for independent artists. At NYFA, Liz's responsibilities included preparing financial reports, analyzing operating expenses, preparing the organization for its annual audit as well as grants management. Additionally, she provided financial advisement and support to over 350 artists and 50 organizations as part of NYFA's fiscal sponsorship program.

Liz has also worked in the finance department of the Mark Morris Dance Group (MMDG), the nonprofit organization that encompasses the international touring company, school, and facility of the world-renowned choreographer. At MMDG, Liz coordinated much of the organization's day-to-day financial operations, including payroll, invoicing, and tax filings. She was also responsible for monitoring facility costs, including maintenance, utilities and capital repairs associated with the 40,000-square foot Mark Morris Dance Center, a pioneer within Brooklyn's burgeoning cultural district. While working at MMDG, Liz experienced first hand the crucial impact a facility can have on both an organization and its surrounding community.

A lifelong theatre lover, Liz has explored both the creative and managerial facets of the performing arts. Liz holds a Bachelors Degree with a Concentration in Theater and Accounting from the Gallatin School at New York University. In her free time, she enjoys volunteering in Central Park for the City Parks Foundation.

At Webb Management Services, Liz works on a variety of projects; examples include a Market Study + Operational Plan for a multi-tenant performing arts facility in Houston, TX and a Performing Arts Venue Assessment for Portland's Regional Arts + Culture Council. She joined the firm in 2008.

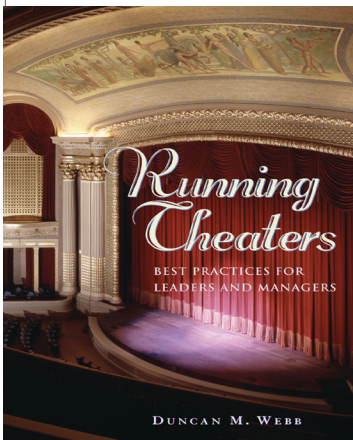
company biography

qualifications, experience + references (continued)

c. experience + references

capability + experience: Webb Management Services has completed 282 projects related to the development and operation of arts and cultural facilities and organizations, with a strong focus in the performing arts. Specific descriptions of projects similar in size and/or scope to the City of Madison's Performing Arts Study are detailed on pages 25 to 29 of this proposal. Specific services include research and analysis, planning for organizational advancement and cultural district development, financial and needs based feasibility studies, arts facility and organization business plans, project management, presenting and programming support – all for arts and cultural purposes.

In addition to project studies, we undertake research initiatives for communities, foundations and governments on a commissioned basis. We also undertake independent research projects and participate in conferences and consortium in order to ensure that we remain connected to trends and issues in cultural facility management, visitor and audience behavior, physical planning and funding strategies for arts and culture. A few examples of relevant research and partnerships follow.



running theaters: best practices for leaders and managers

Released in 2005, Duncan Webb's first book reveals the best practices that consistently lead to operating successful theaters. Culled from surveys and interviews with more than fifty top theater managers and experts, this guide provides proven and successful strategies from managers, staff, and volunteer leaders covering virtually every aspect of running a theater: audience development, fundraising, facility development, programming, community involvement, and much more. Special sections cover physical maintenance, technology in theaters, and staff and board development.

think tank: the performing arts center of 2032

In April 2007, Webb Management Services hosted a conference in New York City to consider the future of performing arts facilities. Over the course of two days, forty performing arts facility managers from around the country worked through a series of presentations and discussions on audiences of the future, where performing arts disciplines are headed, trends in the area of arts funding and how, then, buildings should be planned and developed in order to be sustainable in twenty-five years.

Our expert panelists, relevant research and resulting discussions indicated that, on the whole, performing arts spaces will become smaller, more flexible, less permanent and less formal. Equally important is the idea of designing facilities that support amateur community programs and attract younger audiences with the possibility of an enriching social experience. A narrative report outlining

webb
management
services
think tank



qualifications, experience + references (continued)

discussions and conclusions was published in a monograph released by Americans for the Arts.

culturelab

Duncan Webb is a founding member of CultureLab, an informal consortium of arts consultants and the Cultural Policy Center at the University of Chicago. CultureLab was formed to break down the silos of research, policy and practice, and create a new capacity and approach to tackling challenging issues. CultureLab's goal is to spur relevant research, innovative thinking and in-the-trenches experimentation that will allow the cultural sector to respond more rapidly to changing conditions. In joining together with the Cultural Policy Center at the University of Chicago, the group hopes to create a new capacity in the cultural sector for coordinating research agendas, generating new ideas, injecting knowledge and new practices into a our system, and tackling important issues that others are reluctant to approach. As part of this CultureLab, Duncan Webb served as an advisor for a recently released study entitled *Set in Stone*, addressing a recent building boom of arts facilities and a resulting shift toward the development of smaller and more sustainable and capitalized facilities.

relevant experience over last five years: Following is a list of all relevant experience completed over the last five years. Projects completed within the public sector are noted blue.

- * Demand Assessment for Cultural Facilities, Lubbock, TX (2012)
- * Demand Assessment for the Expansion of Dorothy Chandler Pavilion, Los Angeles, CA (2012)
- * Feasibility Study for Performing Arts Facilities, Pinehurst, NC (2012)
- * Old Town Playhouse Facilities Plan, Traverse City, MI (in progress)
- * City of St. Catharines Cultural Master Plan, St. Catharines, Ontario (2012)
- * Performing Arts Venue Feasibility Study, Okotoks, Alberta (2012)
- * Feasibility Study for the Legacy Theatre, Guilford, CT (2012)
- * Cultural Facilities Master Plan, City of Lee's Summit, MO (2012)
- * Sandler Center for the Performing Arts Operations Review, Virginia Beach, VA (2012)
- * Organizational Assessment and Feasibility Study for the Renovation and/or Amended Operation of the St. Lawrence Centre, Canadian Stage Company, Toronto, Ontario (2011)
- * Feasibility Study for a Downtown Ottawa Concert Hall, National Arts Centre, Ottawa, Ontario (2011-2012)
- * Market Assessment + Business Plan, Independent Arts Collective, Houston, TX (2011)
- * Visioning the Re-use of the Property at Jobs Lane, Village of Southampton, NY (2011)
- * Needs Assessment for Cultural Activity + Facilities, City of Pompano Beach, FL (2011)
- * Needs Assessment + Facilities Planning, Mattoon Arts Council, Mattoon, IL (2011)
- * Arts + Culture in Public Places Strategic Plan + Implementation Guide, City of Round Rock, TX (2011)
- * Expansion Demand Study + Business Plan, Association for the Colonial Theatre, Phoenixville, PA (2011)
- * Market Study for the Renovation of the Colonial Theatre, Laconia, NH (2010)
- * Organizational Assessment, Needs Assessment + Facility Planning, Market House Theatre, Paducah, KY (2010)
- * Operating Review for the Clayton Center for the Arts at Maryville College, Maryville, TN (2010)
- * Feasibility Study for a Multi-Arts Campus, Keene, NH (2010)
- * Feasibility + Business Case Assessment for Performing Arts Facilities, Durham, Ontario (2010)

qualifications, experience + references (continued)

- * Strategic Plan for the Long Center for the Performing Arts, Austin, TX (2010)
- * Needs Assessment + Business Plan for Expanded Arts Facilities, City of Aspen, CO (2010)
- * Needs Assessment + Operating Plan for State Arts Education Facilities, Mass. Educational Theatre Guild, MA (2010)
- * Performing Arts Venues Assessment, Regional Arts + Culture Council, Portland, OR (2010)
- * Scottsdale Cultural Facilities Master Plan, Scottsdale Cultural Council, Scottsdale, AZ (2010)
- * Envisioning the Next Hancher Auditorium, University of Iowa, Iowa City, IA (2009)
- * City of Decatur Cultural Master Plan, Decatur, GA (2009)
- * Performing Arts Facilities Needs Assessment + Operational Planning, City of Lethbridge, Alberta (2009)
- * Arts Facility Needs Assessment + Operating Plan, Tippecanoe Arts Foundation, Lafayette, IN (2009)
- * Riverwalk Public Realm Plan, City of Fort Lauderdale, FL (2009)
- * Silo Ridge Cultural Facility Needs Assessment + Development Options, Amenia, NY (2009)
- * Performance Study for the Chickasaw Nation Fine + Performing Arts Center, Ada, OK (2009)
- * Market Assessment + Concept Development for Cultural Facilities in Harlem, New York, NY (2009)
- * Demand Study + Operational Planning for an OKC Cultural Campus, Oklahoma City, OK (2009)
- * Demand Analysis + Operational Planning for Cherokee Ranch Cultural/Education/Conference Facilities, Sedalia, CO (2009)
- * Theatre Operations + Organization Study, City of La Mirada, CA (2009)
- * Market Assessment + Operational Planning, Caribbean Cultural Center, New York, NY (2009-2012)
- * Demand Analysis + Operational Planning for Cultural Facilities, Hudson Yards Development Corporation (2008)
- * Demand Analysis + Operational Planning for an Arts Space for Everyone, Arlington County, VA (2008)
- * The Economic Viability of an Arts Incubator at Westfield State College, Westfield, MA (2008)
- * Demand Study for the Windsor Armouries Concert Hall, Windsor, Ontario (2008)
- * Nevins Hall Feasibility + Market Study, Town of Framingham, MA (2008)
- * Needs Assessment for Outdoor Performance Facilities, Sedalia, CO (2008)
- * Truckee-North Lake Tahoe Cultural Facilities Plan for Arts + Culture, Truckee, CA (2008)
- * Feasibility Study for the Renovation of the Modjeska Theatre, Milwaukee, WI (2008)
- * Feasibility Study for the Expansion of the WYO Theater, Sheridan, WY (2008)
- * Needs Assessment for the Renovation of the Takoma Theatre, Takoma Park, Washington, DC (2008)
- * Demand Analysis for Small-Scale Cultural Facilities, San Jose Redevelopment Agency, San Jose, CA (2007-2009)
- * City of Sandy Cultural Facilities Feasibility Study, City of Sandy, UT (2007)
- * Market Study + Needs Assessment for a Renovated Loew's Kings Theatre, Brooklyn, NY (2007)
- * Needs Assessment for Arts + Entertainment Facilities, Longmont, CO (2007)
- * Needs Assessment for New + Improved Facilities, Santa Rosa, CA (2007)
- * Strategic + Facilities Planning for Arts Space Consortium, New York, NY (2007)
- * Needs Assessment for Performing Arts Facilities, Atascadero, CA (2007)
- * Needs Assessment for New Cultural Facilities, Chandler Center for the Arts, Chandler, AZ (2007)
- * Needs Assessment for New Cultural Facilities, Glen Allen Cultural Arts Center, Glen Allen, VA (2007)
- * Performing Arts Facilities Needs Assessment, City of Franklin, TN (2007)
- * Performing Arts Facilities Needs Assessment, Fairfax County Master Plan, Fairfax, VA (2007)
- * Market Study for Performing Arts Activity, Hanover Theatre, Worcester, MA (2007)
- * Demand Assessment for Performing Arts Facilities, Grand Action, Grand Rapids, MI (2007)

The following pages include several detailed examples of our most relevant experience.

qualifications, experience + references (continued)



In 2010, the Regional Arts & Culture Council, a nonprofit organization that works to integrate culture into community life in the Portland region, engaged Webb Management Services to complete an assessment of traditional and non-traditional performance facilities utilized by area artists and arts organizations.

Performing Arts Venues Assessment, Regional Arts & Culture Council, Portland, OR (2010)

The Performing Arts Venues Assessment was undertaken in an effort to understand the need for new and improved arts facilities on part of audiences, the region, arts organizations. It also included a comprehensive review of the size, utilization, features and location current facilities. The resulting inventories were adapted into a web-based portal to allow artists and arts organizations to search for space.

This study effort collected data and information via facility visits, interviews with representatives of arts organizations, surveys to artists and arts organizations, assessments of individual organizations' ticket buyers and community input sessions. It also included an operational, financial and organizational assessment of PCPA and its multiple performance venues.

The assessment found that the existing facility inventory included a number of gaps in terms of size, quality, location and availability of space and that groups were using unconventional spaces in ways that speak to their resourcefulness, level of creativity and even the region's devotion to re-use and sustainability. Additionally, we found positive demand for arts facilities that better serve the distinct regional population and opportunities to decentralize and geographically distribute arts activity. The study began to identify strategies, resources and partners to meet those needs.

Reference:

Jeff Hawthorne
Director of Community Affairs
Regional Arts & Culture Council
(503) 823-5258

qualifications, experience + references (continued)



Webb Management Services was hired by the North Lake Tahoe Resort Association ("NLTRA") to develop a cultural facilities plan for new, proposed and/or renovated cultural facilities in the North Lake Tahoe region. This work started with a Needs Assessment, and also included the development of a business plan for each recommendation.

Truckee-North Lake Tahoe Facilities Plan for Arts + Culture, Truckee, CA (2008-2009)

The first phase of work included an in-depth market analysis, inventory of existing cultural programs and facilities and interviews with a diverse cross section of the representatives from the arts, political and business community.

Considering communities in both Nevada and California, the analysis examined key population segments with permanent resident, second homeowner and tourist markets. We then inventoried indoor and outdoor facilities regularly used for public performance, and visual art, heritage and cultural institutions.

Our conclusions recommended infrastructure, programming and facilities to serve arts groups, permanent residents and visitors while complementing existing activity and facilities within local and regional markets.

Given the possibilities, our second phase of work considered site selection, how the community should prepare for new and expanded cultural facilities and how each should be operated, also projecting financial performance over time.

Reference:

Ron Treabess
Director of Community Partnerships and Planning
North Lake Tahoe Resort Association
(530) 581-8735

qualifications, experience + references (continued)



Fort Collins Cultural Facilities Master Plan, Fort Collins, CO (2006 - 2007)

Webb Management Services began the study with a Needs Assessment, conducting research on audiences, demand on the part of local arts organizations, the current supply of facilities and programs in the region and the potential benefits of new facilities for the City and surrounding areas. Initial conclusions found:

- * Propensity and capacity in the market for more arts activity.
- * Local facilities were lacking, therefore stifling program growth.
- * Extensive demand for space by community arts organizations.
- * Demand and opportunity for higher-quality touring activity.
- * A need for added infrastructure to support the health and growth of cultural organizations.

Resulting recommendations included facilities to serve community arts organizations and programs, presenting programs and new collaborations and partnerships.

An important part of the study concerned the future of Lincoln Center, Fort Collins' primary cultural center which also houses significant meeting, event and program space. After considering how the building might better accommodate uses and users, we also considered how current operations could be improved to accommodate varying types of participatory programs, community uses and events.

Basic physical planning and site location exercises followed the first phase of work. We then developed business plans for each recommendation, proposing development and operating scenarios for each, as well as pro-forma operating budgets detailing the first five years of operation for these buildings.

Reference:

Jill Stilwell
Director, Cultural Services & Facilities
City of Fort Collins
(970) 221-6735

In November 2006, Webb Management Services was hired to develop a plan for new, improved and/or expanded cultural facilities that would serve Fort Collins well into the future.

The City of Fort Collins is working to define itself as a cultural destination. Community support for this effort was evident within a number of arts initiatives developing across the City. The goal of the Cultural Facilities Master Plan was to more specifically address and plan for the cultural future of the City as a whole.

qualifications, experience + references (continued)



In 2007, Webb Management Services was hired by the San Jose Redevelopment Agency to evaluate and further develop a plan for new small-scale cultural facilities proposed as part of mixed-use development projects.

Demand Analysis + Strategic Business Planning for Downtown Arts Facilities San Jose Redevelopment Agency, San Jose, CA (2007-2008)

The impetus for the study concerned a number of mixed-use projects that the City Agency was coordinating with commercial developers. Within these projects, the City successfully negotiated the inclusion of space to be devoted to community and cultural purposes and preliminarily identified three non-profit cultural partners to animate and operate these spaces.

The goal of the study was to confirm that these facilities were needed and to suggest other needs that were not being met, and to recommend how any new or improved spaces should be utilized. The effort studied demand in terms of the market and its diversity, the needs and resources of performing arts organizations, the characteristics and costs of existing facilities and community plans and goals. The results found great demand for small-scale cultural facilities and related programming on the part of audiences and users, and in light of the existing facility inventory and downtown development goals. The findings provided guidance around the size, shape, function and location of facilities that would best serve regional populations and arts groups.

A second phase of work reviewed the status of the Agency's three potential non-profit partners. We developed strategic business plans for each of these organizations, helping their leadership to build consensus and develop visions and strategies around organizational development, competitive positioning, programming, operational and financial planning toward the eventual goal of new facilities.

Reference:

Tim Bell

Former Senior Development Officer, Redevelopment Agency of San Jose
Current Real Estate Project Assistant, The Nature Conservancy
(415) 777-0487

qualifications, experience + references (continued)



Since 2006, Webb Management Services has worked with Arlington Cultural Affairs, Department of Parks Recreation and Cultural Resources to advance plans and cultural facilities.

Planning Services for Arlington County Cultural Affairs, Arlington, VA (2006, 2010-2011)

In 2006, Webb Management Services delivered an initial feasibility study and business plan for new cultural facilities to Arlington County. This six month effort examined demand for various types of facilities and began to project the resources that would be required to sustain needed spaces.

In 2010, the County used that initial work to develop a plan to redevelop and re-animate a building being vacated by Newseum. Artisphere, the resulting facility, opened on October 11, 2010, creating a home for the visual and performing arts. Facilities include a black box theater, 220-person dome performance space, exhibition area, ballroom, 36-seat screening room, café and public “town square”, ticket kiosk and retail space. The Artisphere management team is also responsible for the operation of the adjacent 387-seat Rosslyn Spectrum Theatre and Conference Center.

As the building was renovated, Webb Management Services was asked to refine its business plan. We defined the needs, utilization and potential terms of agreement with resident arts groups as well as food service and retail tenants. This included an evaluation of each entity in terms of key offerings, financial stability, frequency of use, and audiences (or clients) and constituents. To understand the competitive market for event space, we assessed comparable event facilities in Arlington in terms of level of rental activity, available spaces, rental rates, and food service capabilities. All of this information led to the development of a detailed pro-forma operating budget.

We subsequently worked with Arlington Cultural Affairs and Artisphere staff to further advance planning for ticketing systems, programming, leadership development, food and beverage service and hiring an executive director.

Reference:

Norma Kaplan

Former Division Chief, Cultural Affairs Division of Arlington County

Current Executive Director, New Brunswick Cultural Center

nkaplan@georgestplayhouse.org

qualifications, experience + references (continued)

d. current + near future workload

Webb Management Services typically manages 7 to 10 projects at any given time, all of which are in varying stages of development. Nearly all of our projects have a 3 to 6 month duration. Many of our projects are set to end in July and August, and we will have more than ample time to focus on the City of Madison Performing Arts Study in the fall. Following is a current list of projects and percentage of completion and expected date of completion

Client	Location	% Complete	Completion Date
Los Angeles Music Center	Los Angeles, CA	95%	August 2012
Market House Theatre	Paducah, KY	20%	September 2012
City of Pompano Beach	Pompano Beach, FL	80%	August 2012
Town of Simsbury	Simsbury, CT	25%	September 2012
Lubbock Chamber of Commerce	Lubbock, TX	75%	September 2012
Old Town Playhouse	Traverse City, MI	75%	October 2012
Metropolitan Opera Guild	New York, NY	60%	October 2012

e. disclosure of conflict of interest

Neither Webb Management Services nor WolfBrown has any conflict of interest for this contract due to any other clients, contracts or property interest. No member of our firm's ownership, management or staff has vested interest in any firm, consultant or subconsultant involved in the project, or any aspect of the project, or with the Department of Planning and Community and Economic Development or the City of Madison.

f. disclosure of contract failures, litigations

Neither Webb Management Services or WolfBrown has any alleged significant prior or ongoing contract failures, breaches or any civil or criminal litigation or investigation pending within the last three years. Our firms have never been found guilty or liable of any contract failures or other legal issues.

g. financial capability

Webb Management Services and WolfBrown are financially stable and capable to perform the work outlined within the RFP Scope of Services.

project approach

a. proposed work plan

Each one of our projects is unique and requires unique analysis and solutions. We take pride in providing customized work, recommendations and advice to our clients. Over 15 years, we have learned many lessons and addressed many challenges. As a result, our approach and work have been structured in response, including studies and planning that:

- * *Build on existing goals and initiatives.* When appropriate, our studies should be structured as an extension of previous work, building on the goals and priorities and considering where communities like Madison plan to be in the future—and how the arts and culture fit into goals and plans for community development.

- * *Is rooted in research.* A Performing Arts Study like the one proposed on Madison must address current and potential demand from the market (audiences) and users relative to the quality and supply of existing facilities and program opportunities. As a result, the process must include a market analysis, cultural inventories and one-on-one interviews with a range of key informants in order to qualify and quantify supply and demand in regard to audiences, programming and facilities. In addition, planning must consider the experience of other institutions, communities and organizations, understood against the particular qualities and character of a community like Madison.

- * *Is community-oriented.* The study process must be inclusive and open, encouraging appropriate voices to be heard. Our work plan proposes community input methods, but we will work with the Steering Committee to refine that plan in order to ensure it is appropriate and relevant.

- * *Is collaborative.* Our studies and plans are developed in close collaboration with our clients. Our process is interactive, iterative and progressive, such that by the time the work is complete, our clients have a strong understanding and ownership of our work and recommendations.

- * *Is flexible but realistic.* The only thing certain with studies and plans like this one is change, and we must be flexible enough in our deliverables and recommendations to encourage and allow for new opportunities as they arise. In addition, our studies are not intended to sit on a bookshelf, but rather to be a well-used road map for achieving objectives and goals identified through our work.

The basic question to be answered within the Performing Arts Study concerns how the performing arts sector—including facilities, artists and arts organizations—can best serve and engage the Madison community in the short, medium and long-term. Our process examines this basic question in terms of key issues: audiences (the market), existing

project approach (continued)

facilities and programs, user demand, the broader goals of the community and funding scenarios.

The process incorporates all of the tasks that the City requests in its RFP, including a market assessment, facility needs, funding and community input. While we would be pleased to organize and deliver our work in terms of the four key tasks outlined in the RFP, we would suggest a fluid process in order to ensure that each component informs overall recommendations and priorities. The following scope is structured as such.

materials review: Review any previous studies on Madison and the local and regional arts markets, especially those related to cultural audiences, programming and/or facilities, including the work completed in preparation and planning for the Overture Center. This effort may also review any broader community-based master plans, strategic plans, market studies and other relevant studies that reflect issues and characteristics of the arts community and how local and regional populations might be changing.

performing arts community assessment: Meet with and survey representatives of creating and presenting cultural organizations in and around Madison to assess their history, sustainability and demand for new and/or better facilities for performance, rehearsal, teaching, production, storage, administration and more. Using interview and survey methods, specifically consider:

- * Their background, mission and structure
- * Their history of attendance, growth and sustainability
- * The basic structure and diversity of their funding base
- * Their current utilization of space and associated costs
- * Their potential demand for different and/or additional facilities
- * Their capacity to grow, expand and work together
- * Their capacity to afford new cultural facilities

In addition to performing arts organizations, we will gather information from amateur and professional independent performing artists, other cultural professionals, film presenters and media organizations, regional presenters, facility operators, businesses, arts educators, and community leaders via a variety of sources, including surveys, one-on-one interviews and workshops, to assess demand for performing arts facilities and potential levels of use from broader sectors of the community.

performing arts market (audience) assessment: Collect information and conduct analysis to answer several key questions with regard to Madison audiences and arts market, including the following:

- * Are Madison's performing arts groups extracting a reasonable amount of demand

project approach (continued)

from the marketplace, given the demographic characteristics of the marketplace?

- * Is there room for audience growth? If so, where is the greatest potential?
- * What trends in cultural participation are most likely to affect Madison performing arts organizations, and what are the implications of these trends on facility needs?

Specific analysis will include the following:

market definition + demand estimates: Obtain customer address lists from a cross-section of Madison performing arts groups and conduct a mapping analysis of up to 10 ticket buyer/audience lists to establish a geographical market area for the performing arts in Madison. Using attendance rates from the National Endowment for the Arts' most recent survey of public participation in the arts, produce estimates of demand for the different art forms, adjusted for education levels – the single best predictor of arts attendance. *Arts groups that provide lists will be provided with maps of their patrons, along with an aggregated map of all patrons.*

comparable markets demand analysis: Measure demand for arts attendance in Madison and three other communities with similar demographic and other characteristics (e.g., university communities of similar size and characteristics, potentially including Fort Collins, Colorado, Gainesville, Florida, Lawrence, Kansas, or Lincoln, Nebraska). Compare attendance and tickets sales volume for classical music, opera, Broadway musicals, stage plays, ballet and other dance, and potentially other artistic forms. Using the results, contextualize demand in the Madison marketplace and draw conclusions about market opportunity and factors influencing demand.

trends workshop: Leading arts market specialist Alan Brown will lead a day-long workshop for Steering Committee members and representatives of the Madison arts community on trends in cultural participation and consumer behaviors related to performing arts attendance. The workshop will include breakout sessions on topics of specific relevance to Madison, such as creative use of alternative venues and settings, new formats, and the trend towards more active forms of participation. Participants will be asked to consider the implications of these trends for Madison's arts infrastructure.

arts consumer survey (optional): Design and administer an on-line survey to send to available email lists. Arts groups in Madison will be invited to send the survey invitation to their own email lists. This will not be a random sample of the general population, but a non-random cross-section of Madison area arts attenders. The survey will cover topics such as out-of-town attendance patterns, preferences for different types of arts programs, awareness and use of programs offered by specific Madison arts groups, barriers to increased attendance, price sensitivity, attitudes about the Overture Center and other venues, and other topics. Results will be made available to

project approach (continued)

the Steering Committee and cooperating arts groups through a password-protected online dashboard tool, and summarized in a brief memorandum report. Key findings from the survey will be incorporated into the overall study analysis.

performing arts facility assessment: Collect information and conduct analysis to answer several key questions with regard to Madison audiences and arts market, including the following:

- * How are venues supporting public, commercial and non-profit performing arts, creative, education and business organizations in the performing arts sector?
- * How are these venues supporting audience participation and community involvement?
- * Are gaps in the inventory limiting opportunities for performing arts programming and audience participation?
- * What impact might different, improved or new facilities might have on the market and operation of existing and planned facilities?

In order to answer these questions, we will begin with and expand the City's existing facility inventory in order to:

- * Review the size, features, activity and location of existing and planned performing arts facilities in and around Madison.
- * Expand inventories for traditional performance and program space used by performing artists and arts organizations on a regular basis to suggest the quality, size, affordability, activity, use and availability of these venues.
- * Discuss the level, characteristics and type of informal venues used for performing arts activity.
- * Examine the utilization and costs of the Overture Center to suggest how this facility fits into and serves the regional arts community.
- * Map the locations of facilities to understand their proximity to one another, and their accessibility to transportation and key neighborhoods and population bases.
- * Review all information to suggest gaps, needs and priorities in terms of the size, type, function and characteristics of performance space.

benefits, impacts + community goals: Also consider the broader goals of Madison alongside facility supply and demand issues. More specifically:

- * What are the City's short and long term goals, as indicated in planning documents and interviews with City leadership?
- * What are the potential impacts and benefits (for the short and long-term) that performing arts facilities might have on the City of Madison and surrounding region?

project approach (continued)

To answer this question, we will meet with a cross-section of community and business leadership and review city planning goals and priorities in order to determine how improved or new facilities can play a role in broader community goals, including such issues as downtown development, economic impact, educational opportunities and cultural tourism, and how these various relationships affect demand for facilities and programs.

funding for the performing arts: Review levels and sources of funding for performing arts venues and organizations in order to consider:

- * What do levels and sources of earned and contributed income suggest about the health and sustainability of the performing arts sector in Madison?
- * Does the current funding scenario and climate suggest a need to develop or augment particular funding sources?
- * What do nationwide trends and funding scenarios in comparable communities suggest about funding gaps and priorities in Madison?

Specific tasks will include the following:

- * Collect and assess information on levels of earned and contributed income—and sources—for a selection of performing arts venues and organizations for the last three years. Include earned revenue as well as support from government, foundation, corporate and individual sources.
- * Benchmark funding sources and levels for key facilities and organizations against those in other national communities of comparable size and type.
- * Provide an overview of national trends in giving in the performing arts and nonprofit sector, suggesting how historical reliance on particular channels is changing, particularly in light of the recent recession.
- * Identify gaps and opportunities to modify, develop or support funding streams for performing arts venues and organizations.

comparable facilities + cultural communities: To inform recommendations and priorities, identify communities similar in size and character to Madison that have successfully implemented community-wide long-term performing arts facilities plans that led to sustainable and incremental improvements to the cultural landscape.” Specifically discuss partnership strategies that have led to sustainable cultural facility development and operation. Also describe facilities comparable to any recommended facility concepts in similar regions around North America, including information about size, components, location, cost and keys to success, to inform and validate the choices being made for Madison.

community workshop(s): With the assistance of the Steering Committee, schedule and conduct between one and three community workshops to communicate the progress

project approach (continued)

of the study and invite feedback on emerging themes and priorities. These sessions may be formal (structured presentation) or informal (drop-in format), but should be held in familiar and accessible public venues.

recommendations + priorities: Based on the analysis of audiences, facilities, organizations/artists and community goals, provide conclusions and recommendations around at least two key issues:

performing arts facilities: Describe and discuss facility needs and improvements necessary to serve Madison audiences and performing arts organizations in the short, medium and long term. Include detailed recommendations on ideal locations, sizes, capacities, key components, levels of flexibility and types of activity that need to be accommodated. Identify partnerships, governance, ownership, oversight and financing models to ensure sustainability and reach. Then prioritize recommendations in terms of demand and supply issues and the broader goals of the Madison community and suggest strategies to develop any new resources or oversight structures.

sector-wide funding, service + support: If necessary, also offer suggestions on partnerships, programs and strategies that support the sustainability of the performing arts sector, considering issues such as administrative training, shared resources and funding support.

workshop + draft report: Issue a draft report including all analysis, conclusions and recommendations. Present and discuss the findings and recommendations of the work-to-date to the Steering Committee (ideally in a workshop setting) as well as Common Council and any other commission or constituents.

presentation + final report: Issue a draft report including all analysis, conclusions and recommendations. Present and discuss the findings and recommendations of the work-to-date to the Steering Committee (ideally in a workshop setting) as well as Common Council and any other commission or constituents.

additional community input: The needs and opportunities for community engagement are different in every community. As a result, we would look forward to working with the Steering Committee to design a specific communications strategy for the process. The process will include informational interviews and group meetings and may include on-line surveys, a study blog, community coffees and presentations as desired.

time line: Our team is ready and willing to begin this work as soon as notice to proceed is received. We would expect to complete the study effort within the 6 month time frame noted in the RFP. Following is a breakdown of time line by task, with the numbers noting total hours per task. Check marks note weeks where there are key deliverables, including

project approach (continued)

Tenantive Timeline							
Task/Month	1	2	3	4	5	6	Total Hours
Materials Review	█						36
Performing Arts Community Assessment	█						88
Performing Arts Market Assessment	█						102 or 166
Performing Arts Facility Assessment		█					68
Benefits, Impacts + Community Goals		█					8
Funding for the Performing Arts		█					96
Comparable Facilities + Cultural Communities				█			42
Community Workshops				█			32
Recommendations + Priorities				█			40
Workshop + Draft Report		█					64
Presentation + Final Report						█	28
Additional Community Input	█						24

b. contract administration methods

internal management, quality control + client satisfaction: Webb Management Services is a small and collaborative firm with a project manager (Duncan Webb, President) and at least two other team members who are completely involved in each project component. Our internal process includes a system of checks and balances in order to control the quality and timing of our work. In addition, the background of all of our employees (current and any future), with an important combination of experience and training, ensure that we are delivering quality, effective research and planning to the satisfaction of our clients. We would encourage the Steering Committee to contact our references, who can best speak to our ability to deliver high quality, effective and timely services and deliverables.

cost containment: Our projects almost always include a not-to-exceed fee based on our estimate of work hours. Sometimes challenges with data, information collection or client schedules arise, causing us to exceed those anticipated hours and internal costs. Regardless, we always deliver the promised scope and provide high quality work product within the scheduled time line and for the contracted not-to-exceed fees.

risks, impacts, success factors + key challenges: There are unique issues and challenges in each of the communities and projects that we undertake. While we can't presume to know the current challenges at play in Madison until beginning work, we can speak to issues common to our other projects.

project approach (continued)

* *Considering and incorporating trends.* It is our job to bring unique insights to cultural facility analysis and planning projects, including lessons learned from previous experience and knowledge of trends in the development, programming and operation of cultural space. Sometimes these trends and ideas are met with resistance. They include strategies to attract younger audiences, opportunities for more active arts participation, the development of facilities that are open and active around the clock, the development of smaller, flexible and adaptable performance space and more. We incorporate trends into our scope of services and use these lessons learned to inform our analysis and recommendations.

* *Understanding utilization and demand for non-traditional facilities.* Nationwide, performing artists and arts organizations use their homes, churches and borrowed public and private spaces to create and perform. It is sometimes a challenge to gauge use of these spaces, but we must consider them within the overall context of the study. We address this issue within interviews and survey tools, carefully asking the performing arts communities to share experiences with all types of space.

* *Defining the role of the public and private sectors.* In most projects, particularly those initiated or managed by the public sector, it is critical--and challenging--to carefully define the role of both the public and private sectors in terms of facility development, ownership, governance, maintenance and ongoing operation. We work to define these roles, build consensus among project partners, and when necessary, translate these terms into a formal MOU.

* *Combating perceptions and presumptions.* Oftentimes, discussions around the need for new or improved facilities have been going on for years, to the point that community members (and particularly cultural leaders) have already taken a position on what should happen. In Madison, this could be a particular issue, given the Overture Center and other existing facilities. Our challenge is to bring clear and objective information and insights into the discussion that allow public and private sector leadership to build consensus around the work at hand—and to develop deliverables that clearly communicate data and research leading to findings and recommendations.

* *Participant fatigue.* As in Madison, cultural facilities planning sometimes follows other planning and study efforts that have required time and attention from community and cultural leaders as well as the general public. We must therefore be sensitive in terms of the information and time commitment we ask for from study participants, and we must carefully communicate the goals and outcomes of this plan relative to previous efforts.

project approach (continued)

* *Engaging the broader community.* In many communities, there is one group of active and outspoken community advocates that most frequently participate in public processes. But most planning efforts must aim to engage a broad cross-section of the community. As a result, we encourage our clients to hold community meetings in non-traditional places (like coffeehouses) and to provide flexible means for input (on-line or stop-ins rather than formal meetings.)

We consider our studies to be successful when they are clear, concise, compelling and correct, incorporating all of the scope elements presented in this proposal, providing important, unique and customized value and direction to our clients and delivered on time and on fee.

c. city resources

Our proposed work plan describes information and data collection and analysis. We would look to the City to provide us with relevant planning documents for review, digital versions of any existing facility inventories or information, contact information for artists, arts groups, facilities and other constituents that should be involved in the study. We would also ask City leadership, constituents and Steering Committee members for a reasonable amount of time and input to inform our work.

We would look to City staff to help us identify and organize input from appropriate constituents, as noted in the work plan. However, we do have resources and systems in place to aid in data collection, scheduling of interviews and meetings and more. We are relatively self-sufficient aside from the need to reach the proper constituents and organize meetings with Steering Committee, study constituents and the community. If our needs ever exceed available City staff resources, we are also willing to contract, at our own expense, a local affiliate to help administrate the study and related community input methodology.

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