

THE CITY OF MIAMI BEACH

Re-imagining the Byron Carlyle Theater Site: Proposal for Consulting Services

March 27, 2023

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Background

The City of Miami Beach (the City) is moving forward with giving a new life to an iconic landmark, the Byron Carlyle Theater (BCT), a site that it has owned since 2001.

Developing that property has been challenging for some time but the City is now eager to take steps with a new approach motivated in part by a recent external assessment of possible options (the August 2022 study by Shulman + Associates) and the issuance of a municipal bond to finance the project.

The first step has been the solicitation of statements of interest from potential partners in the programming, operation, and management of a re-purposed BCT site, a possible prelude to an RFP process ahead. The City received 13 Letters of Interest (LOI) on February 22, 2023.

Pending a review of the letters of interest received, the City is open-minded about the mix of future offerings in a re-imagined BCT building which may include affordable residential housing along with a variety of ancillary services and public spaces. This said, the City appears at this stage to favor a cultural role for—or in—the new facility.

The City has contacted Chora, a firm with broad experience in cultural planning and museum consulting, to assist with the selection of the ideal cultural partner. The "white canvass" characteristic of the project makes it well suited to Chora's wide-ranging know-how and commitment to cultural promotion.

Chora's engagement falls into five outcomes:

- **Outcome 1**, Chora will propose a rating and ranking framework and qualification process that results in the selection of the ideal cultural partner (programmer and operator) of the future Byron Carlyle Theater redevelopment project ("the future BCT cultural partner").
- For **Outcome 2**, Chora will apply the City approved rating and ranking framework to short-list four potential BCT cultural partners ("candidates") from the list of thirteen that responded to the request for a letter of interest.
- In **Outcome 3** Chora will prepare comprehensive organizational profiles of the four short-listed candidates.
- For **Outcome 4** Chora will schedule and conduct interviews with the four short-listed candidates. The interview panel will include City representatives and community stakeholders.



- Finally, in **Outcome 5** Chora will further qualify the four short-listed candidates based on information gathered through the interview and recommend the ideal future BCT cultural partner to partner with the City in the redevelopment of the BCT site and program and operate the Byron Carlyle Theater for the City.

This proposal outlines the scope of Chora's work, the deliverables, and the fees and schedule.

At this time, the City has not decided if a further RFP process will take place. Chora's engagement described below assumes that RLOI submittals will suffice but the decision on how to proceed ultimately rests with the City.

About Chora

Chora is a consulting firm dedicated to serving cultural and educational organizations that are contemplating strategic change. Since 2006, we have offered a full range of planning and organizational development services to both emerging and established institutions in the US and abroad. Chora's client roster is rich and can be found at <http://www.choracreative.com>.

Chora's principals are:

Robert (Sully) Sullivan Sully has over 50 years of experience in museum management, programming, and fundraising. From 1991 to 2006, he served as Associate Director at the Smithsonian's National Museum of Natural History, where he managed all aspects of public programs including exhibitions, education, and national outreach. He directed the New York State Museum in Albany and the Rochester Museum and Science Center before that. Sully holds a graduate degree in management of non-profit organizations from the University of Rochester. His academic research interests, and extensive leadership and management experience have made him a highly regarded authority in the cultural planning field.

Maria Elena Gutierrez With a background in management and finance, Maria Elena brings to the non-profit sector a business perspective acquired from years of experience in the private sector. Maria Elena worked for Lehman Brothers and McKinsey & Co. and headed the Investor Relations Department of one of Latin America's largest companies before joining the Smithsonian in 2002. Maria Elena holds a BA from Dartmouth College and an MBA from Yale University.

Additional back-office support for project management, logistics, research, and quantitative analysis is provided by: Heather Rostker (MA, George Washington University), Brad Cartwright (MFA, University of Baltimore), Shuda Li (MBA and MSF, Indiana University), Gianna Donati (MBA and MPA, University of Pittsburgh), Lindsey Dona (BS, Mansfield University), Bryan Buckner (BA, University of Maryland), Carmel



Mills (BBA, Averett University) and Alessandro Zanello (MPhil - Oxford University, PhD - Massachusetts Institute of Technology). Academic and strategic support is provided by Professor Pier Luigi Sacco (International University of Language and Culture, Milan, and the Beckman-Klein Center at Harvard).

Chora offers a team of highly motivated and creative people. Our hallmark is a collegial approach and a thorough, fact-based understanding of the challenges they face. Our knowledge of the cultural industry is deep and broad. Our recommendations are operational. And our commitment to strengthening the missions and roles of museums and cultural organizations everywhere is absolute.

Chora's methodology combines data-driven research and analysis to offer practical solutions. A rigorous quantitative assessment of a cultural organization's finances and comparative performance is combined with a keen appreciation of its contribution to the quality of life and educational ecology of the community it serves. Expertise in cultural planning complements our extensive experience in museum management and leadership.

Chora's commitment to inclusion and diversity pervades its organization. Founded by a Mexican native (Maria Elena), Chora employs a cadre of professionals with diverse skills and backgrounds.

Three members of the Chora team, including at least one principal, will be the counterparts of the City of Miami Beach for the duration of the engagement.

Section 1. Scope of Work

Outcome 1: Rating and Ranking Framework and Process for Partner Selection

Purpose and Description:

To establish a transparent and objective rating and ranking process for the selection of a cultural partner to program and operate the Byron Carlyle Theater (i.e. "the future BCT cultural partner"). The 13 (non-binding) letters of interest received by the City on February 22 (and the RLOI process itself) will help frame the selection criteria. Final criteria and framework will be approved by the City given the preferences for the cultural dimensions of a revitalized BCT site. Chora will contribute its best professional judgment on the likely cultural impact of the selected bid, to the extent that it falls within its domain of expertise. In other words, Chora will not assess potential benefits flowing from a non-cultural use of the BCT site (e.g., its use for residential apartments, commercial or shopping/dining venues).



Chora's Role: Develop and create the rating framework and process.

Methodology: Desk research, review of best practices, and interviews with City counterparts to develop an approved rating and ranking framework.

Deliverables:

- City-approved rating and ranking process with selection criteria

Estimated Hours: 39

Estimated Fees: \$6,048

Estimated Duration: One month (Completed by May 1)

Outcome 2: Evaluation Report with Recommendations

Purpose and Description:

To evaluate the organizations that submitted the 13 Letters of Interest (LOI) to the City pursuant to RFLI 2023-261-KB issued on January 25, 2023, using the approved framework and provide a report with up to 4 short-listed potential cultural partners.

Chora's Role: Prepare a report with recommendations for up to four short-listed potential cultural partners.

Methodology: Review each RLOI response; rank and rate each applicant against the rating and ranking framework and issue recommendations for up to four short-listed potential cultural partners to be further reviewed and interviewed (Outcomes 3 and 4).

Deliverables:

- Completed rating and ranking forms for each of the 13 Letters of Interest
- Report with a recommended short-list of up to four organizations

Estimated Hours: 229

Estimated Fees: \$34,083

Estimated Duration: Two months (Completed by May 31¹)

¹ Assumes a start date or notice to proceed of April 1, 2023.

Outcome 3: Comprehensive Organizational Profiles of the Short-Listed Potential Cultural Partners

Purpose and Description:

To create comprehensive organizational profiles for each of the four short-listed potential cultural partners. The organizational profiles will include organization background and history, Board and staff information, description of program major offerings, audience reach and impact, funding sources, and relevant financial data.

Chora's Role: In-depth research of the four potential cultural partner's history and key organizational and operational performance indicators. Chora will provide written profiles for each.

Methodology: Desk research and analysis, report preparation.

Deliverables:

- Report with comprehensive organizational profiles for each of the four short-listed potential cultural partners

Estimated Hours: 192

Estimated Fees: \$28,373

Estimated Duration: Two months (Completed by July 20)

Outcome 4: Interviews with Short-Listed Potential Cultural Partners

Purpose and Description:

To schedule and facilitate interviews with the four short-listed organizations, the consulting team and the City of Miami Beach representatives (representatives may include City Administration as well as members of the North Beach Community Redevelopment Agency, the Miami Beach Cultural Arts Council, and Miami-Dade County's Cultural Affairs Department).

Chora's Role: Chora will coordinate with the City to determine final interview participants, develop interview questions, and schedule and conduct the interviews with the four shortlisted organizations.

Methodology: Desk research, calls, and interviews.



Deliverables:

- Completed interviews with the short-listed potential cultural partners
- Interview questions for each of the short-listed potential cultural partners

Estimated Hours: 80

Estimated Fees: \$12,674

Estimated Duration: Three months (Completed by August 31)

Outcome 5: Final Report and Recommendations

Purpose and Description:

Provide the City with a rating and ranking report with recommendations for the selection of a cultural partner.

Chora's Role: Prepare a final report and presentation to City representatives that summarizes the selection criteria, process, and final recommendations for the most promising cultural programmer and operator of the Byron Carlyle Theater.

Methodology: Desk research, critical analysis, final recommendations, and report preparation.

Deliverables:

- Final report with recommendations for the selection of a cultural partner
- Presentation of recommendations to City of Miami Beach representatives

Estimated Hours: 94

Estimated Fees: \$12,839

Estimated Duration: Two months (Completed by October 31)

Section 2. Work Organization

Place of Work:

Chora LLC is based in Washington, DC. All work will be performed remotely via Zoom, conference calls, and email correspondence.

Fees:

Table 1 summarizes each component of the envisaged work. Prices reflect Chora's best estimate of the time and effort required to complete each deliverable.

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Table 1

Phase / Deliverable	Estimated Hours	Estimated Fees before Travel
Outcome 1: Rating and Ranking Framework and Process for Partner Selection		
Desk Research	8	\$1,070
Draft Framework	8	\$1,470
Approved Rating and Ranking Forms	8	\$1,470
Core Team Meetings	11	\$1,588
<i>Project Management</i>	4	\$450
Total Outcome 1: Rating and Ranking Framework and Process for Partner Selection	39	\$6,048
Outcome 2: Evaluation Report with Recommendations		
Desk Research (annotated diary)	109	\$16,510
Completed rating and ranking form	55	\$8,255
Data visualization	8	\$1,270
Final Report with short-listed organizations	25	\$3,810
Core Team Meetings	11	\$1,588
<i>Project Management</i>	21	\$2,650
Total Outcome 2: Evaluation Report with Recommendations	229	\$34,083
Outcome 3: Comprehensive Organizational Profiles (Short-listed Candidates)		
Quantitative workbook	17	\$2,540
Qualitative categories	105	\$15,875
Report draft	34	\$5,080
Report formatted	8	\$1,070
Core Team Meetings	11	\$1,588
<i>Project Management</i>	17	\$2,220
Total Outcome 3: Comprehensive Organizational Profiles (Short-	192	\$28,373
Outcome 4: Interviews with Short-listed Candidates		
Rosters and bios	8	\$1,070
Interview questions tool	4	\$635
Completed interviews	42	\$7,550
Transcripts and notes	8	\$1,070
Core Team Meetings	9	\$1,429
<i>Project Management</i>	7	\$920
Total Outcome 4: Interviews with Short-listed Candidates	80	\$12,674
Outcome 5: Final Report and Recommendations		
Draft Report	13	\$1,905
Final Report	11	\$1,588
Report Deck	17	\$2,140
Presentation Meeting	29	\$3,745
Core Team Meetings	16	\$2,381
<i>Project Management</i>	9	\$1,080
Total Outcome 5: Final Report and Recommendations	94	\$12,839
Grand Total	633	\$94,015

Schedule:

Table 2 includes a conceptual timeline for the duration of the contract.

Table 2

Phase / Deliverable	Estimated Start Date	Estimated Completion Date
Outcome 1: Rating and Ranking Framework and Process for Partner Selection		
Desk Research	Apr-03	Apr-14
Draft Framework	Apr-13	Apr-21
Approved Rating and Ranking Forms	Apr-24	May-01
Core Team Meetings	Apr-01	May-01
<i>Project Management</i>		
Total Outcome 1: Rating and Ranking Framework and Process for Partner Selection	Apr-2023	May-2023
Outcome 2: Evaluation Report with Recommendations		
Desk Research (annotated diary)	Apr-21	May-31
Completed rating and ranking form	Apr-21	May-31
Data visualization	May-01	May-31
Final Report with short-listed organizations	May-15	May-31
Core Team Meetings	Apr-21	May-31
<i>Project Management</i>		
Total Outcome 2: Evaluation Report with Recommendations	Apr-2023	May-2023
Outcome 3: Comprehensive Organizational Profiles (Short-listed Candidates)		
Quantitative workbook	Jun-01	Jun-30
Qualitative categories	Jun-01	Jun-30
Report draft	Jun-30	Jul-17
Report formatted	Jul-17	Jul-20
Core Team Meetings	Jun-01	Jul-20
<i>Project Management</i>		
Total Outcome 3: Comprehensive Organizational Profiles (Short-	Jun-2023	Jul-2023
Outcome 4: Interviews with Short-listed Candidates		
Rosters and bios	Jun-01	Jul-20
Interview questions tool	Jun-15	Jul-20
Completed interviews	Jul-01	Aug-25
Transcripts and notes	Aug-25	Aug-31
Core Team Meetings	Jul-01	Aug-31
<i>Project Management</i>		
Total Outcome 4: Interviews with Short-listed Candidates	Jun-2023	Aug-2023
Outcome 5: Final Report and Recommendations		
Draft Report	Sep-01	Sep-15
Final Report	Sep-07	Sep-29
Report Deck	Sep-07	Sep-29
Presentation Meeting	Oct-02	Oct-31
Core Team Meetings	Sep-01	Oct-31
<i>Project Management</i>		
Total Outcome 5: Final Report and Recommendations	Sep-2023	Oct-2023
Grand Total	Apr-2023	Jul-2023

Table 3

Additional services may be contracted on an hourly basis. Schedule of rates are included below.

Rate	Title	Name of Staff and location	Years of Experience	Rate per Hour
A	Principal	Robert Sullivan	50	\$250
A	Principal	Maria Elena Gutierrez	25	\$250
B	Financial Analyst	Shuda Li	15	\$200
B	Financial Analyst	Yannan Wang	10	\$200
B	Senior Economist	Alessandro Zanello	30	\$200
C	Associate Consultant	Heather Rostker	20	\$150
C	Associate Consultant	Gianna Donati	2	\$150
C	Associate Consultant	Brad Cartwright	10	\$150
D	Graphic Designer	Lindsey Dona	10	\$100
D	Program and Administrative Support	Carmel Mills	22	\$100

Travel:

There is no anticipated travel to complete this work.

Payments:

Table 4 below includes a schedule of payments for each outcome. All invoices will be delivered electronically to a counterpart designated by the City of Miami Beach and according to the terms in the contractual agreement.

Table 4

Milestone	Invoice Amount	Estimated Invoice Date
Upon execution of the contract	\$23,504	Apr 2023
Upon completion of Outcome 2	\$16,626	May 2023
Upon completion of Outcome 3	\$28,373	Jul 2023
Upon completion of Outcome 4	\$12,674	Aug 2023
Upon completion of Outcome 5	\$12,839	Oct 2023
Grand Total	\$94,015	

Closure:

Chora will conduct a final meeting with the City's counterparts to transfer relevant project files and bring its engagement to a formal closure. Payment of the final invoice to the City of Miami beach marks the end of the project.