

## Visual Identity RFP Q&A

### General

#### Could you identify your preferred timeline for this work?

We want to complete this visual identity project by the end of September 2021.

#### Could you let us know if you are open to a Canadian agency to do this work as we have with other US clients or do you have a local preference?

We'd be open to considering a firm outside of the United States. However, knowledge of the Hudson Valley and region will be critical to the project outcome, so we'd just specify that any research or necessary travel falls within the budget for the project.

#### What type of research reports already exist, both from HVSF as well as acquired spaces (The Garrison, Valley Restaurant), on competitors and audiences? Would we have access to any qualitative or quantitative reports, surveys, interviews, demographic analysis?

For the past several years, HVSF has conducted audience surveys. We also have general information from our CRM system that we could make available to the selected firm/designer. We'd be open to discussing what information would be useful to inform the design process.

#### How would we be supported in further research? Would we have access to your audience (customers and donor/member community)? Actors? Employees?

You would have access to our employees. We'd be open to considering access to our actors and our broader community as part of the process. We'd just want more information on the type of access needed and the best way to facilitate.

#### Are there any challenges and/or opportunities in the acquisition of the restaurant and event space that we should consider in our response to this RFP? How will customers from those entities fold into the bigger HVSF community? And how will that impact our approach to branding?

The main challenge we've identified with the acquisition of the restaurant and event space is that even though these are existing entities, we want to establish HVSF as the umbrella brand over them and the anchor for the campus.

We don't have accessible data on the existing customers of these businesses. But HVSF has been part of the community for over three decades, so we imagine that the majority of local customers will be familiar with our organization. The goal here will be to continue to welcome them to the restaurant and further their engagement with the other opportunities on the campus with HVSF.

**How will this move impact Education programs? In addition to the opportunity to extend your season beyond the 12 weeks, are there other plans for program expansion that we should be aware of?**

We are looking forward to expanding our season later into the beautiful Hudson Valley fall, with performances running into mid-October. Performances in September and early October will allow us to grow our education partnerships and welcome school groups to matinee performances. We also look forward to making the large indoor gathering spaces (used for events almost exclusively on the weekends) available for community events and after-school educational programming.

**Can you tell us more about your role in land stewardship?**

Part of HVSF's commitment in accepting these acres for our new home is a renewed dedication to sustainability and environmental stewardship. Our plans include converting existing golf fairways to wildflower gardens and native meadows. Maintaining a golf course requires a great deal of water and pesticides that result in nitrogen-rich runoff and a grass monoculture flattens all biodiversity. Our design team includes an ecologist, who has done a wildlife survey on the site, identifying areas where the transformation from a golf course to a sustainable campus with native meadows will restore crucial habitat for ground-nesting birds and pollinators. In transforming the course into a theater campus we will reduce the amount of water required to maintain the site, eliminate the need for pesticides, bring back plants and species that have not been able to thrive due to golf maintenance requirements.

**How far along will the architectural plans be at the time the naming and design process is taking place? Will plans/sketches be shared with us? What will our relationship be with the architecture and landscape architecture firms?**

This process will take place before architectural plans are underway. However, we have site plans from our landscape architecture firm that we can share to inform the process. We also have preliminary documents from our architecture firm, StudioGang, that we can share.

We envision the design firm having little interaction with these firms and coordinating with HVSF directly. If it is helpful we can arrange an initial discovery meeting with these firms.

**Who will be making final decisions on naming and design? What will communication channels look like between those parties and the design team?**

The final naming decision will be made by HVSF's senior staff and board. HVSF's Director of Marketing and Communications will be the point of contact for the design team. We will, however, ask the team to present to our board and staff during the project.

**What is the desired timeline for this project? Will the project need to be completed before the launch of the capital campaign? When is that slated to occur?**

The timing for the launch of the public phase of the capital campaign is in flux. We want to complete this visual identity project by the end of September 2021.

**Once the project is complete, who will be responsible for deploying the new identity? What role will we play in the handoff and in the implementation of design systems across the organization's channels?**

Once the project is complete, the HVSF staff will be responsible for deploying the new identity. Because of this, we want to be sure to work with our design partner to develop strong brand guidelines that employees can adhere to.

**What role will the new naming/design system play in achieving quantitative goals? What metrics might be used in evaluating success?**

We haven't defined success metrics for this project but could work with our selected firm/designer to define what those might be. I.e. An X% increase in our social media followers the month after the unveiling of the new identity.

**How was the original "Hudson Valley Shakespeare Festival" name conceived?**

The Hudson Valley Shakespeare Festival was founded by Melissa Stern and Terry O'Brien in September 1987 with an outdoor production of *A Midsummer Night's Dream* at Manitoga, home of industrial designer Russell Wright, in Garrison, NY. The following year, Boscobel House and Gardens agreed to host HVSF's mainstage season on the estate's expansive grounds, and that summer's production of Shakespeare's *As You Like It* was performed under a tent overlooking the Hudson River.

At first, the organization was only producing Shakespeare, and the mission was explicitly about that: "We produce Shakespeare plays in X Y Z style." Festival was conventional for theaters associated with Shakespeare 35 years ago. Hudson Valley spoke to the region rather than just Garrison or Cold Spring.

More on HVSF's history here: <https://hvshakespeare.org/about/history-future/>

**What do you see as its strengths? Its weaknesses? Has its use evolved over the years? If so, how?**

Over the years, HVSF has grown and evolved but the name has remained the same. The mentioning of the "Hudson Valley" is important because it emphasizes the organization's commitment to the surrounding community. "Hudson Valley" as a location has name recognition and is associated with beautiful landscapes, a hallmark of HVSF performances.

“Festival” is generally associated with something temporary and seasonal. HVSF has been operating year-round in classrooms throughout the region for numerous years. And as we move to this new space we will be thinking about expanding our season. With this expanded programming in mind, this part of the organization’s name doesn’t reflect all of our efforts.

**What parts, if any, of the existing names (“Hudson Valley Shakespeare Festival”, “Theater Tent”, “The Garrison”, “Valley Restaurant”) need to be retained? Are you open to a total rename of all entities?**

Certain elements will need to be retained. This will be part of a conversation with our selected firm/designer.

**Apart from physical entities, are there existing programs or initiatives that need to be considered in the naming process?**

HVSF does have programming beyond our mainstage season and we should consider how these programs could be structured with a new name. I.e. Our [HVSE2 reading series](#)

**Do you foresee the creation of new spaces or programs in the future that would need to be a part of the naming/brand system?**

Yes, but likely many years down the line. This is however why it’s important to define naming conventions for the overall site now, so that in the future we will have a structure in place for new entities.

**Are there any contractual agreements about the naming of the new spaces (donor obligations)?**

Not for the items we are asking for in this RFP.

**I understand that you will be acquiring The Garrison and Valley Restaurant, as they exist on your new land—what is the relationship between HVSF and the people who currently run these properties? Are they closing and re-opening as a different entity after the rebranding exercise? Why will they not continue to run as they do now?**

HVSF will remain a non-profit organization, but the gift from Chris Davis will include the events business and the restaurant and bar (not the golf course). HVSF will create a for-profit subsidiary to own and operate the hospitality business from which any net profits can support the maintenance of the site and our mission-based priorities. We are grateful for Chip Allemann, the General Manager at The Garrison, and the amazing staff there who have been helping us think through what this new structure will look like. The current staff will remain and they will continue to operate as they do now, with the potential to expand their hours of operation to serve HVSF audiences.

**Under the Proposal Requirements / Action Plan, are you looking for us to clarify our process for this project?**

Yes, as part of the proposal we are looking for an overview of your approach for accomplishing the services requested in this RFP.

From the document:

## **2. ACTION PLAN FOR SCOPE OF SERVICES**

*Provide a description of the agency's overall approach including strategies for accomplishing the Scope of Services and rationale for the agency's approach. Please provide an overview of your approach and how you could successfully implement the services requested.*

### **To what extent are you bound by (outside conditions) on the naming of the site; What historical and donor-related naming encumbrances exist already?**

We don't have any restrictions or conditions or restrictions on the naming of the overall site that we need to adhere to. There will be items within the site itself that will have naming rights, i.e. the Theater Tent, particular lawns, etc., but we are not asking for expertise on those items in this RFP.

### **The budget is only for the work related to the new site is there an ongoing/upcoming opportunity for the theatre promotions side of the marketing?**

This budget is specific for the visual identity for this new site. As we move forward in the process of designing the site, there may be other opportunities to work with this design partner that we would reach back out and develop a separate agreement for.

### **Are we looking for URL names for the website?**

This should be a factor when considering naming conventions, but the selected firm/designer will not be responsible for implementing a new URL for the organization.

### **Are best practices within SEO being considered as well within this request?**

As part of advising HVSF on industry best practices and positioning the organization among its peers, we'd like for the selected firm to consider SEO. But we are not requesting a full audit as part of the scope of this project.

### **If so, how does this currently impact any existing SEO strategies?**

HVSF currently works with a digital marketing agency to manage Google Ads and paid online advertising. We can coordinate a conversation with the selected designer/firm for this project and the agency to discuss existing strategies if that will be helpful for the process.

**Is the idea here to have one overarching parent name and then child name subsets to establish uniformity or complimentary names that associate with one another?**

Yes. The main challenge we've identified with the acquisition of the restaurant and event space is that even though these are existing entities, we want to establish HVSF as the umbrella brand over them and the anchor for the campus.

**From the RFP:**

***Advise on industry best practices and position the organization among its peers***

**Are you looking for naming, messaging, lexicon and positioning initiative here?**

We are looking for our selected firm/design to consider the larger theater landscape, both in NYC and comparable regional theaters, and how this new visual identity can stand out in the field.

## **Design**

**What elements, if any, from the existing HVSF brand need to be retained?**

There are not specific elements that need to be retained, but the new identity should not feel completely alien to our existing audience. Part of the process will be working with the designer/firm to discuss how to best achieve this.

**How have infographics been employed by the festival in the past? What sorts of data need to be accommodated?**

In the past, HVSF has used infographics to convey the reach of our programming and to illustrate general information about our audience. For example, in our [annual education report](#). And [in our emails](#).

**How have you managed and directed photography in the past? How do you hire and work with photographers? Do you have an existing archive of photography for the festival?**

HVSF hires a professional photographer to take photos at an invited dress rehearsal for each play we perform. Additionally, if we have a supplementary event on a particular evening we may hire a photographer to take pictures of audience members during the pre show. We supplement these professional photos with images taken by our staff and artists.

We have an existing archive of photography that we can share with the selected designer/firm.

**In the Project Scope, one of the line items is “Design System and conventions”. Can you please clarify this?**

Once the visual identity and design guidelines are complete, it will be up to the staff at HVSF to implement the new identity onto materials at the organization and maintain it moving forward. With this in mind, as part of this process, we want to create systems and protocols with the identity that can be implemented by staff moving forward.

Additionally, we want to define a system that any new programming at HVSF could be worked into.

**When we assess naming for design conventions and its correlation to the website can you elaborate on the following:**

**Can you define design conventions a bit further?**

See answer above.

**Do you plan to have coordinated (memorable) residue for the theatergoers, or restaurant diners? By this, I mean for the theatre any posters; swag, tchotchkes, trinkets, matchbooks etc...**

Yes, we plan to use this identity on print materials for our 2022 season and in the interim on swag related to our new site for project supporters.

**Do you plan to use the design as digital support material for any filming/title cards for presentations beyond the tent?**

**Will there be motion design in the future of the project...for the identity...**

Yes, this identity will be incorporated into promotional videos for the festival. For example, this short, [promotional video about the festival experience](#).

**Is there an interior design partner for the restaurant?**

**Will the identity of the restaurant play a role in the restaurant experience.**

No, and we're not doing any work to the restaurant. In the immediate term, we're not redesigning any of the current facilities.