

OKANAGAN FEST OF ALE SOCIETY



REQUEST FOR PROPOSALS  
SOCIETY ADMINISTRATION AND EVENT COORDINATION

ISSUE DATE: May 22, 2019

CLOSING DATE: June 12, 2019 @ 4:00pm local time



Table of Contents

<b>Introduction</b> .....	3
<b>1. OBJECTIVES AND SCOPE OF WORK</b> .....	3
<b>2. ESSENTIAL FUNCTIONS</b> .....	3
2.1. Administration .....	3
2.2. Financial Management.....	3
2.3. Operations Management:.....	4
<b>3. PROPOSAL QUALIFICATION REQUIREMENTS</b> .....	4
3.1. Covering Letter.....	4
3.2. Proponent Profile and References.....	4
3.3. Contractor Team .....	4
3.4. Services .....	4
3.5. Methodology.....	4
3.6. Scheduling.....	4
3.7. Fees & Disbursements .....	4
<b>4. RFP PROCESS</b> .....	5
4.1. Final Date and Time for Receipt of Proposals.....	5
4.2. Late Proposals .....	5
4.3. Cost of Proposal Preparation .....	5
4.4. Evaluation and Criteria.....	5
4.6. Clarification .....	6
4.7. Negotiation .....	6
4.8. Confidentiality.....	6
4.9. Proposal Documents .....	6
4.10. Gifts and Donations .....	6
4.11. Acknowledgement .....	6
4.12. Documentation Requirements.....	6
<b>5. INQUIRIES</b> .....	6
<b>6. PROCUREMENT TIMETABLE</b> .....	7
<b>SCHEDULE B</b> .....	8
<b>SCHEDULE C</b> .....	9



## Introduction

The Okanagan Fest of Ale Society (“the Society”) is seeking an enthusiastic individual or team to provide year round administrative support, marketing and advertising and event management for its operations. Namely, the annual Okanagan Fest-of-Ale Event in Penticton, British Columbia.

Since 1996, The Okanagan Fest of Ale event has been bringing together craft beer enthusiasts and brewers to celebrate beer! Spring of each year, Penticton is host to one of the largest and longest running annual beer festivals in the Pacific Northwest. This two-day event features great entertainment, food and the opportunity to sample a diverse array of quality crafted beverages.

Operating as a non-profit society, and managed by a Volunteer Board of Directors, the Okanagan Fest of Ale Society hosts the annual consumer craft beer festival that functions to support and promote the growing craft beer industry, enhance local tourism, and donate to charitable organizations within the South Okanagan and Similkameen region. The Society is thrilled, that since its inception, it has donated \$697,660 back to the charities throughout the Region.

## 1. OBJECTIVES AND SCOPE OF WORK

The Society has endorsed a comprehensive Policy, Procedure and Operational manual which will be made available to the successful proponent. To provide a base understanding of the timeline of required steps and event logistics, a high-level work breakdown is provided in “Schedule B”.

## 2. ESSENTIAL FUNCTIONS

### 2.1. Administration

Provide professional preparation, recording and reporting of all monthly meetings of the Board, and any tasks forces and/or committees as designated by the Board.

Ensure accurate records are maintained for the Okanagan Fest of Ale Society and delivered to the Board on a regular basis to maintain backup digital records.

Ensure the Okanagan Fest of Ale is at all times in compliance of all municipal, provincial, and federal laws, and the British Columbia Societies Act.

Ensure all licenses and insurance is current and reviewed annually by the Board.

Represent the Okanagan Fest of Ale Society and its annual event with professional and tactful manner at all times.

### 2.2. Financial Management

Provide professional financial management of Okanagan Fest of Ale Society accounts and budgets, including but not limited to; provision of monthly financial statements to the Board, timely maintenance of Accounts Payable and Accounts Receivable.



### 2.3. Operations Management:

Preparation and delivery to the Board, subject to approval by the Board, or an annual “Operation Plan” identifying quarterly benchmarks contribution to annual strategic goals. The progress of the Operations Plan must be reported quarterly to the Board.

## 3. PROPOSAL QUALIFICATION REQUIREMENTS

### 3.1. Covering Letter

A covering letter signed by an authorized representative of the proponent, outlining the proposal and stating that the information contained in the proposal accurately describes the services to be provided.

### 3.2. Proponent Profile and References

A description of the proponent’s organization, size, services provided, areas of expertise and length of time in operation must be included and a list of references. If there are special concerns or restrictions on the Society’s use of a reference, these concerns must be stated in the proposal.

### 3.3. Contractor Team

A list of the individuals forming part of the proponent’s team that is to provide the requested contractor services, including a description of each individual’s role and a copy of each individual’s resume.

### 3.4. Services

Please describe the delivery model your company intends to use to provide the services and how your company will meet the required society schedule. (Outline proposed method of service delivery and confirmation that proponent is able to meet requirements of proposed form of contract, Schedule B of this RFP, including with respect to insurance, workers compensation and governmental approvals including by requiring a business licence).

### 3.5. Methodology

The Proponent must show that they have an understanding of what is required to carry out the scope of work listed in Schedule B.

### 3.6. Scheduling

The proposal will include a schedule for the provision and completion of the services (start-up, information gathering, site visits, preliminary plans etc., as applicable).

### 3.7. Fees & Disbursements

The proposal will set out all fees and disbursements to be charged to the Society for the provision of the services, and shall break out such amounts for each service component, as applicable. All amounts shall be in Canadian dollars.



## 4. RFP PROCESS

### 4.1. Final Date and Time for Receipt of Proposals

All proposals must be received by 4:00 pm (local time) on Wednesday June 12, 2019. Proposals must be sent electronically to the following email address: [ofobids@gmail.com](mailto:ofobids@gmail.com)

### 4.2. Late Proposals

Proposals received after the deadline will be not be considered.

### 4.3. Cost of Proposal Preparation

Proponents shall be solely responsible for the costs of preparing and submitting a proposal and all costs incurred in any subsequent negotiations with the Society.

### 4.4. Evaluation and Criteria

The Society intends to select the proposal that it considers most favourable to the Society's interests. To that end, the Society considers "Best Value" as the essential part of engaging a Contractor and therefore the Society may prefer a proposal with a higher cost, if the Society considers that it offers greater value and better serves the Society's interests.

Schedule C contains the information regarding how Proposals will be evaluated. The evaluation team will not be limited to the criteria listed in Schedule C, and the evaluation team may consider other criteria that the team identifies as relevant during the evaluation process. However, any criteria considered will be applied evenly and fairly to all Proposals.

The Society, at its sole discretion, reserves the right to:

- reject any or all Proposals whether complete or not,
- reject any Proposal it considers not in its best interests,
- waive any minor irregularity or insufficiency in the Proposal submitted,
- not be liable for misunderstandings or errors in the Request for Proposals,
- issue addenda to the Request for Proposals,
- contact references provided by the Proponents,
- retain independent persons or contractors for assistance in evaluating Proposals,
- request points of clarification to assist the Society in evaluating Proposals,
- negotiate changes with the successful Proponent,
- award separate contracts for separate work components, and
- withdraw the Request for Proposals.

### 4.5. Evaluation Committee

The Society has established an evaluation committee, which will forward recommendations to the Fest-of-Ale Board for a final decision.



#### 4.6. Clarification

The Society may seek clarification from a proponent respecting its proposal to assist in making evaluations.

#### 4.7. Negotiation

The Society may choose to negotiate with a preferred proponent, or any proponent, on any aspect of their proposal, including changes to the service to be provided and to price.

#### 4.8. Confidentiality

The Society will hold all submissions in the strictest confidence.

#### 4.9. Proposal Documents

All documents submitted to the Society in response to this RFP, or as part of any subsequent negotiation, will become the property of the Society and will not be returned.

#### 4.10. Gifts and Donations

Proponents will not offer entertainment, gifts, gratuities, discounts or special services, regardless of value, to any member or director of the Society.

#### 4.11. Acknowledgement

By submitting a response to this proposal, the proponent acknowledges that they have carefully reviewed the documents, and understand the scope of this assignment; further, they confirm that their proposal (including all applicable costs) is developed in accordance with same.

The proponent shall make no claim for reimbursement of any portion of any costs incurred in developing a response to this proposal.

#### 4.12. Documentation Requirements

Proponents may require and provide to the Okanagan Fest-of-Ale Society a copy of a valid business licence, a copy of their WCB Clearance Letter and a copy of their Liability Insurance (with the Society named additional insured) upon award of contract.

### 5. INQUIRIES

All inquiries related to this RFP are to be directed to the following person(s). Information obtained from any other source should not be relied upon. Enquiries and responses will be recorded and the Society may choose to distribute same to all proponents. Questions will be answered if time permits.

For General Inquiries Contact: Chair, OFOA Contracts Committee at: [ofobids@gmail.com](mailto:ofobids@gmail.com)



## 6. PROCUREMENT TIMETABLE

Activity	Date
RFP advertised	May 22
Closing date for receipt of proposals	June 12
In-person presentations	June 18
Selection of proposal	June 18
Award of proposal	June 20
Commencement of contract	September 01 2019



**SCHEDULE B**  
Objectives and Scope of Work

September

- Review prior year financials
- Annual General Meeting (AGM)
- Election of Officers
- Allocation of charitable funds
- Distribute Policy/Procedure/Operational Manual
- Set meeting dates (October to May)

October

- Review and amend Policy/Procedure/Operational manual as required
- Determine sub-committee structure
- Charity Grant Disbursement & Volunteer Appreciation event

November, December and January

- Marketing & Sponsorship Committee report
- Confirm vendor list
- Judging Committee report

February

- Licensing Committee report
- Confirm event floor plan
- Marketing & Sponsorship Committee update
- Review of Entertainment

March

- Review event day timeline and onsite logistics
- Set Date for Volunteer Appreciation
- Set Meeting Dates (October to May)
- Endorse event venue contract for upcoming year

April

- Volunteer orientation
- Main event

May and June

- Review post event reports and Director feedback
- Identify items for improvement
- Review Board vacancy/recruitment

July/Aug

- Budget review
- Review and rank charitable grant applications





SCHEDULE C

Evaluation Criteria

Proponent's Name:		Evaluation Date:		Evaluator:	
_____		_____		_____	
Step 1:		YES	NO		
Mandatories	Proposal received prior to closing				
	Proponent profile and references				
	Contractor Team				
	Services				
	Fees and disbursements				
	Complete proposal as requested				
Step 2:		Assigned Points	Points		
Proponent (15-30 points)	Qualifications of firm and project team members	5			
	Experience of firm and project team members	10			
	Past performance / references	10			
	Resources	5			
	Scope	5			
	Methodology	10			
	Scheduling	5			
	Project Team - Level of Effort	5			
Clarity of Proposal	5				
Price (20-50 points)	Points for Price = (lowest cost Proposal divided by Proposal being evaluated) x (20% weight)	40			
Total Score	Proponent + Proposal + Price Scores	100			