



REQUEST FOR PROPOSALS

Event and Judging Competition Management Contract

MAY 24, 2018
OKANAGAN WINE FESTIVALS SOCIETY

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ABOUT THE OKANAGAN WINE FESTIVALS SOCIETY

The Okanagan Wine Festivals Society (OWFS) was founded in 1980 in the infancy of the Okanagan wine industry. Since then, we have grown alongside the industry itself, and now produce four seasonal festivals with over one hundred events annually, as well as two wine judging competitions; one of which is the oldest in the province.

Registered under the BC Societies Act, the OWFS operates as a not for profit membership organization with two types of membership – Member Wineries and Tourism Partners/Associate Members. The organization operates with the following Mission, Vision and Values:

Mandate

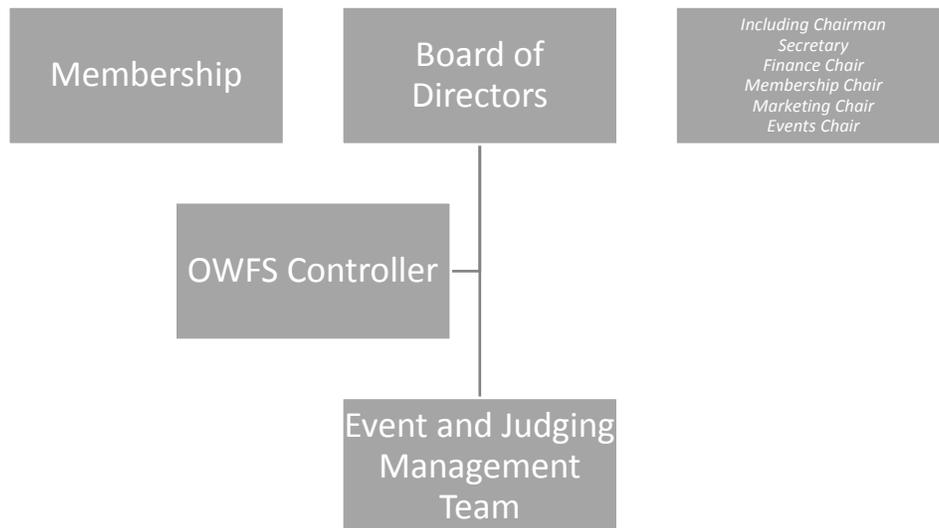
To promote the growth of the Okanagan wine industry through seasonally inspired festivals and judging competitions, and provide the opportunity to our members to create their own profitable events that are the cornerstones of each Festival.

Vision

To drive sales at the cellar door for each of our member wineries.

Values

The OWFS operates with the following core values: equity to ensure fair treatment of winery members; and tourism partners; economic sustainability to ensure its ability to grow; social responsibility; partnerships with private sector first and public sector second; research to make informed decisions; innovation to show leadership to the industry; and high standards of execution of events to ensure brand stewardship.



REQUEST FOR PROPOSALS INVITATION

The Board of Directors of the OWFS is seeking proposals for qualified event management services to work with the Board as well as the OWFS Controller to plan, manage and execute the OWFS Strategic Plan including the organization, planning and facilitation of our signature seasonal wine festivals and judging competitions.

Objective

The objective of this Request for Proposal (RFP) is to select a qualified proponent who can work with the OWFS Controller and Board of Directors to effectively execute the OWFS Long-Term Strategic Plan on a multi-year contract basis. The contract includes the following tasks:

- Plan, prepare and execute all OWFS signature seasonal events and judging competitions
- Coordinate event logistics with tradeshow partners
- Secure, administer and maintain strategic partnerships and corporate sponsors
- Event risk management
- Work with OWFS Controller to develop and meet annual budget requirements
- Report quarterly or as directed to Board of Directors

SCOPE OF SERVICES

The successful proponent will be responsible for the overall management and execution of the OWFS including all requirements noted below.

Member Relations

Develop member relations strategy in order to encourage new membership and engage current members.

- Conduct regular member and post-event surveys to determine success of programs and ensure we are best serving our members
- Host Annual General Meeting in November for all Member Wineries and Partners
- Respond promptly to inquiries from Members and Partners

Event Management and Execution

Develop, plan and implement signature seasonal events in Spring, Summer, Fall and Winter including:

- Obtain necessary permits, insurance and licenses
- Develop and coordinate operations plan including critical path, event venue, set-up, décor and day-of logistics
- Coordinate event entertainment
- Organize member registration
- Ticketing
- Marketing and promotion
- Ensure partnership recognition at signature events

Judging Competitions

Plan and execute the two major OWFS judging competitions including the BC Best of Varietal in the Spring and the British Columbia Lieutenant Governor's Wine Awards in the Fall including:

- Encourage and solicit winery registration
- Plan and execute the judging
 - Judge selection and coordination of travel and accommodation
 - Judge familiarization tour
 - Venue selection and coordination
 - Execution of blind-tasting
 - Compile results and release winners list
- Work with Government House to arrange for the Lieutenant Governor to present the British Columbia Lieutenant Governor's Wine Awards in the Fall
- Marketing of the awards to garner additional ROI pre, during and post-judging
- Coordinate events surrounding the release of the competition winners

Marketing & Media Relations

Plan and execute marketing initiatives to meet the OWFS mandate and to sell-out events.

- Advertising strategy utilizing a combination of traditional and digital platforms
- Manage the OWFS social media accounts and create engaging content in order to increase reach and followers
- Manage OWFS website and app
- Manage email marketing database and regularly connect with users with engaging content about OWFS and its members
- Execute familiarization tours to generate media coverage on our seasonally-inspired festivals and our member wineries
- Produce event material and collaterals

Partnerships & Corporate Sponsors

Develop a sponsorship strategy to secure, recruit and maintain partners and corporate sponsors that are suitable for the OWFS.

- Negotiations and onboarding, including contract execution
- Continuing communication to ensure a mutually beneficial relationship
- Provide sponsor guidelines for pertinent events and ensure recognition at signature events
- Regular reporting and consultation with the Board of Directors

Risk Management

Ensure that the integrity of the OWFS and its signature events are kept in-tact by guaranteeing all safety and security standards are at the highest level as per outlined in the current strategic plan.

- Obtaining all required licenses, permits and security plans
- Ensuring all staff and winery pourers are able to present their Serving It Right (SIR) certification
- Ensuring professional security personnel are onsite for all signature events
- Ensure options of either a Safe Ride Home program or accommodation option provided
- Operate within data governance plans and regulations

Human Resources Management

Reporting to the OWFS Board of Directors and Controller, the proponent will be responsible for the management of their selected team:

- Determine staffing and volunteer requirements for the management contract

- Establish a positive, healthy and safe work environment in accordance with all appropriate legislation and regulations
- Ensure that all staff receive adequate training
- Ensuring staffing practices are in accordance with the Employment Standards Code

Finance

Work within the approved annual budget to execute the planned events and judging strategy.

- Work with the OWFS Controller to plan and meet budget targets and present on a quarterly basis, or as required, to the Board of Directors
- Ongoing focus on the financial growth of the Society
- OWFS will work with external accounting firm to execute annual financial statements and work within accepted accounting principals

Net Profit to the Society

	2017	2016
Income (incl. membership dues, ticket sales, judging entries,	\$427,635	\$425,291
Expenses (operating expenses, administration,	\$389,974	\$386,077
Net	\$37,838	\$39,252

Reporting

The successful proponent will report directly to the OWFS Board of Directors.

- The successful proponent will provide the OWFS Board of Directors and Members with a detailed strategic plan including objectives, tactics and measurable key performance indicators on which year-end success will be measured
- The proponent will present planning updates, results and financial statements as needed to the Board of Directors and general Membership at the Annual General Meeting held in November as well as provide meeting minutes immediately following said events
- Regularly communicate with the Board Chair and pertinent Board Members (Membership Chair, Marketing Chair, Events Chair, Finance Chair and Secretary)

SUBMISSION REQUIREMENTS

All proposals must include, but are not limited to, the following components:

- Company and team profile outlining the services you provide and relevant experience
- Example of a suggested work plan providing a detailed explanation of how you plan to achieve the RFP requirements
- Detailed examples of work in related areas
- A minimum of three references preferably from wine, tourism or community festivals that have been customers within the past three years. Please include the name of the organization/business, contact name, phone number and email

Please note that the successful proponent will be required to be a legal entity allowed to work in Canada and further information may be requested after proposals are submitted and reviewed.

Submission Deadline

Proposals will be accepted up until 5:00 PM (PST) on July 6, 2018. Proposals will only be accepted via email to lindsay@kelmcommunications.com. If your proposal is more than 10 MB, please send a WeTransfer or Dropbox link.

Any proposals received after the cut-off will be rejected. Note that OWFS will not be liable for delay for any reason including technological delays, spam filters, firewalls, job queue, file size limitations, etc. It is the proponent's sole responsibility to ensure they allow themselves enough time to submit their proposal prior to the posted closing date and time.

RFP AND CONTRACT SCHEDULE

RFP tendered | May 25, 2018

RFP Submission Deadline | July 6, 2018

Shortlist Selection | July 23, 2018

Shortlist Presentations | September 2018

Contract Awarded | October 15, 2018

Contract Begins | November 1, 2018

The management contract will be granted on a 3-year term.

CONTACT

Should you have any questions regarding this RFP, please contact:

Lindsay Kelm, Okanagan Wine Festivals Board Chair

lindsay@kelmcommunications.com

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