

Request for Proposals – Event Planning/Management

Request for Proposals (RFP)					
Scope of Service	Event Planning and Management Firm				
RFP #	2021RFP01				
RFP issued by	Camrose Regional Exhibition & Agriculture Society (CRE)				
Issue date	April 9th, 2021				
Closing date/time	Proposals must be received before 16:00 hours (4:00 pm) Mountain Time on: May 3rd, 2021				
CRE Contact Information and Questions	<p>All enquiries related to this RFP including any requests for information, questions, and clarification, are to be directed to the following email address; dkohler@cre.ab.ca indicating the RFP number in the subject line of the email.</p> <p>CRE will accept questions up to five working days prior to the close of this RFP. Any questions received after this day, CRE will respond if time permits. Information obtained from any other source is not official and should not be relied upon. Enquiries and any responses will be recorded.</p>				
Delivery of proposals ("Closing Location")	Please submit all responses as one (1) PDF file via email to dkohler@cre.ab.ca . If the file size is too large, splitting the response into two (2) PDF documents is acceptable.				
Short Listed Proponents	For those Proponents which have not been contacted by end of business day on May 7th, 2021 will serve as notice that their proposal submission was unsuccessful.				
Successful Proponent Notified	Week of May 10th, 2021				
Expected Term	<table border="0" style="width: 100%;"> <tr> <td style="width: 50%;">Expected Start Date of Project: May 24th, 2021</td> <td style="width: 50%;">Expected End Date of Project: May 24th, 2024</td> </tr> <tr> <td colspan="2">The CRE shall have the right to extend this Contract upon written notice to the Contractor.</td> </tr> </table>	Expected Start Date of Project: May 24th, 2021	Expected End Date of Project: May 24th, 2024	The CRE shall have the right to extend this Contract upon written notice to the Contractor.	
Expected Start Date of Project: May 24th, 2021	Expected End Date of Project: May 24th, 2024				
The CRE shall have the right to extend this Contract upon written notice to the Contractor.					
Proponent's submissions	A person authorized to sign on behalf of the proponent must complete and sign the Proponent Section (below), leaving the rest of this page otherwise unaltered and include the originally signed and completed page with the proposal.				

Proponent Section	
To be completed by proponent and included after the Title Page of the Proponents Response.	
The enclosed proposal is submitted in response to the above-referenced RFP including any addenda. Through submission of this proposal, we agree to all of the terms and conditions of this RFP and agree that any inconsistencies in our proposal will not be considered. We have carefully read and examined the RFP including the <i>Appendix A</i> and have conducted such other investigations as were prudent and reasonable in preparing the proposal. We agree to be bound by the statements and representations made in our proposal.	
Signature of Authorized Representative:	Legal Name of Proponent (and Doing Business As Name, if applicable):
Printed Name of Authorized Representative:	Address of Proponent:
Title:	
Date:	
Authorized Representative email address (if available):	Authorized Representative phone number:

Request for Proposals – Event Planning/Management

1. Summary of the Requirement

The Camrose Regional Exhibition & Agriculture Society (CRE) wishes to procure the services of a full-service event planning and management contractor to assist in producing and managing all CRE Signature Events.

The terms and conditions applicable to this RFP are identified in *Appendix A – Definitions and Administrative Requirements*. Submission of a proposal in response to this RFP indicates acceptance of all terms and conditions that are included in *Appendix A*, and any addenda subsequently issued by the CRE. Provisions in proposals that contradict any of the terms of this RFP will be as if not written and do not exist.

2. Background

The CRE is an Agriculture Society located in Camrose, Alberta that is a registered charity and a provincial non-profit organization. Our vision is to make a positive impact on the communities we serve by consistently challenging ourselves to provide greater value.

The CRE hosts many events for clients but also produces 5 CRE Signature events per year. There events are:

- Canadian Bull Congress – January
- CRE Aggies Education Days – February
- CRE Acreage & Garden Show – April
- CRE Oktoberstock – September
- CRE Holiday Hoedown – November

Four of the five signature events will be produced for the 1st time ever starting in September 2021 so the successful contractor will have a big impact on making these events successful and building them into long running series for the CRE.

3. Scope

CRE intends to enter a multi-year contract with the successful Proponent, who is a full serviced event management contractor. The successful contractor will oversee and provide event planning and management services for all CRE Signature events for the duration of the Agreement. Note that the Agreement may be extended with the same terms and conditions by written notice to the successful Proponent.

3.1. Services

The Contractor shall provide the following services for all CRE Signature events for the duration of the Agreement:

- a) Develop and maintain project planning processes, such as:
 - Prepare event agenda and content creation.
 - Manage committee's agenda items and actions items.
 - Provide any update related to the agenda & actions items to the organizing team.
 - Record minutes.
 - Create a volunteer plan for employees' roles onsite and hiring event staff/contractors.
 - Prepare and distribute material/package/swag to attendees.
 - Develop and monitor critical path and milestones.
 - Develop and be primary contact for Sponsorship.
 - Track expenditures.
 - Provide project status updates to CRE's Executive Director and CRE Board of Directors.
 - Be easily accessible to meet via Zoom/in-person on a regular frequency.
 - Managing sub-vendor expenditures - décor, material design/development, printing, badges, and lanyards.

Request for Proposals – Event Planning/Management

- b) Act as primary capacity for event logistics, such as:
 - Sub-vendor and sub-activity management including exhibitors, information booths.
 - Registration and attendee management, jointly with CRE.
 - First point of contact for attendee questions and inquiries.
 - Collateral development (such as program, design, invitations, signage) previously approved by CRE Communications team.
 - Presenter and special guest coordination.
 - Event preparation (such as banquet event order, floor plans), jointly with CRE.
- c) Additional Requirements:
 - Knowledge of current Event Safety guidelines for workers and attendees.
 - Experience running Agriculture events (3+ years)
 - Experience running Free Community events (3+ years)

3.2. Deliverables

The CRE requires the following deliverables:

- Event program and invitations.
- Organizing committee meeting agendas and action-items.
- Participant packages.
- Sponsorship/Booth Sales financial targets.
- Project plan/critical path.
- Expenditure tracking tool.
- Sub-vendor agreements within allocated event budget, including negotiated rates, complimentary/reduced concessions (if applicable).
- Online registration system and reports.
- Signage.
- Floor plans.
- On-site Event Manager handling all client/guest interactions with support from CRE Staff.
- Food & Beverage plan.
- Final Report after the completion of each event.

4. Responsibility and Work Performed by CRE and Proponents

The successful Proponent will:

- a) Be responsible to examine all of the documents comprising this RFP and report any errors, omissions or ambiguities and seek additional information, by email, to the Contact Person. See Cover Page for details on seeking additional information and clarification.
- b) Will have the full cooperation of CRE staff and access to information necessary to meet the accountabilities set out in this request for proposal and respond to reasonable inquiries, should the Proponent be the successful one.

CRE will:

- a) Provide a mutually agreed upon level of resources (human and financial resources) to the successful proponent to meet the accountabilities set out in this request for proposal.
- b) The following mutually agreed upon resources will be provided by the CRE:
 - Provide comments on milestones in a timely fashion.
 - Provide comments on progress reporting.
 - Provide feedback to the successful Proponent(s) in a timely fashion; and

Request for Proposals – Event Planning/Management

- Be available for meetings for duration of Agreement period.

5. Proposal Format

The following format, sequence, and instructions should be followed in order to provide consistency in Proponent response and to ensure that each proposal receives full consideration. All pages should be consecutively numbered, and as follows:

- a) Title page;
- b) Proponent section, completed and signed;
- c) Table of contents;
- d) Proponent profile;
- e) Key personnel;
- f) Detailed proposal information;
- g) Proponent experience;
- h) Pricing; and
- i) Value add.

5.1. Mandatory Items on the Proposal

Proponent responses must clearly demonstrate that they meet the following mandatory criteria or they will be excluded from further consideration during the evaluation process:

- a) The Proponent's proposal must be received at the closing location before the specified closing time;
- b) The Proponent's proposal must be in English and MUST NOT be sent by regular mail, facsimile, email or couriered;
- c) Submissions are to be emailed to dkohler@cre.ab.ca

5.2. Desired Items in Each Section of the Proposal

Proponents should populate the Proposal sections as described below.

5.2.1. Title Page

The Proposal should include a title page with the following information:

- a) The RFP number, scope of service, and closing date/time;
- b) The name, address, contact person, phone number and email address of the Proponent; and
- c) The date of the Proposal.

5.2.2. Proponent Section

The Proposal should include the completed and signed Proponent Section located on page 1 of this RFP.

5.2.3. Table of Contents

The Proposal should include a table of contents, with page numbers.

5.2.4. Proponent Profile

The proposal should include a brief introduction to the Proponent, including the details requested in *Appendix B*, in the Corporate Criteria section.

5.2.5. Key Personnel

Proposals should identify and describe the Proponent's key personnel who, if the Proponent is successful, would participate in the delivery of services.

The description of key personnel should include the details requested in *Appendix B* under *Service/*

Request for Proposals – Event Planning/Management

Technical Criteria #4. In addition, this summary should include their proposed role in the delivery of services and their availability to ensure that services are delivered in a timely manner.

5.2.6. Detailed Proposal Information

The Proponent should include a detailed description of the services and methodology that it proposes in response to the requirements of this RFP. This should include answers to the criteria requirements in *Appendix B*:

- Service/Technical Criteria #2-3;
- Event Criteria #5; and
- The anticipated support/involvement needed from CRE staff.

5.2.7. Proponent Experience

Proposals should include a list and details of projects the Proponent has completed that are similar to the services required in this RFP. These project summaries should describe how they address the criteria requirements in *Appendix B*:

- Service/Technical Criteria #1, 5-8;
- Event Criteria #1-4.

5.2.8. Pricing

Proposals should contain a clear breakdown of the proposed pricing representing the details as required in *Appendix B*, Financial Criteria section.

5.2.9. Value Add

The Proponent may include any value adds (see *Appendix B*, Service/Technical Criteria #9) they believe they can provide to directly benefit CRE's ability to achieve the objectives laid out in this RFP.

6. Evaluation

An evaluation committee will be formed by the CRE and shall include employees. All personnel will be bound by the same standards of confidentiality.

The mandatory and desirable criteria against which proposals will be evaluated are identified in the Appendices. Proponents should ensure that they fully respond to all criteria to be comprehensively evaluated.

The CRE may request and receive clarification from any Proponent when evaluating a proposal. The evaluation committee may invite some or all the Proponents to appear before the committee to clarify their proposals. In such event, the evaluation committee may consider such clarifications in evaluating proposals.

6.1. Evaluation Scoring

The Proposals must comply with *Appendix A* and proposals will be evaluated as identified below:

- a) The responses must pass all the mandatory criteria listed above to be considered. Responses not satisfactorily meeting all mandatory requirements may be excluded from further evaluation at the discretion of the evaluation committee.

Request for Proposals – Event Planning/Management

b) See table below:

Evaluation Criteria	Description	Weight
Corporate Criteria	Proponents must demonstrate that they are positioned so that services and support can be provided to CRE over the long term.	15%
Financial Criteria	Proponents are to provide the solution that provides the best value for CRE's investment and provides the required services and functionality for the lowest total cost of ownership.	25%
Service/Technical Criteria & Value Adds	Proponents are to demonstrate, in detail, how the proposal will meet all of CRE's service requirements; and New/innovative and value-added approaches to service delivery	25%
Event Criteria	Proponents can clearly demonstrate knowledge and understanding of successful Agriculture events (including Livestock) and free Community Events. Successful previous event knowledge and a senior understanding of delivering positive ROI on events.	35%
Total		100%

6.2. Short Listed Proponents

The short-list will comprise the highest-ranked Proponents based on the weightings for the criteria as identified above.

Proponents which are short listed may be requested to interview in person, and/or teleconference, with the evaluation committee to discuss certain aspects of their submitted proposal.

Appendix A - Definitions and Administrative Requirements

1. Definitions

Throughout this Request for Proposals, the following definitions apply:

- a) "Contract" means the written agreement resulting from this Request for Proposals executed by the CRE and the Contractor;
- b) "Contractor" means the successful proponent to this Request for Proposals who enters into a written Contract with the CRE;
- c) "the CRE" means the Camrose Regional Exhibition & Agriculture Society;
- d) "must", "shall" or "mandatory" means a requirement that must be met in order for a proposal to receive consideration.
- e) "Proponent" means an individual or a company that submits, or intends to submit, a proposal in response to this Request for Proposals.
- f) "Request for Proposals" or "RFP" means the process described in this document; and
- g) "Should" or "desirable" means a requirement having a significant degree of importance to the objectives of the Request for Proposals.

2. Terms and Conditions

The following terms and conditions will apply to this RFP. Submission of a proposal in response to this RFP indicates acceptance of all terms that follow and that are included in any addenda issued by the CRE. Provisions in proposals that contradict any of the terms of this RFP will be as if not written and do not exist.

3. Late Proposals

Proposals will be marked with their receipt time at the closing location. Only complete proposals received and marked before closing time will be considered to have been received on time. Late proposals will not be accepted and will be returned to the Proponent. In the event of a dispute, the proposal receipt time as recorded at the closing location shall prevail.

4. Eligibility

Proposals may not be evaluated if the current or past activities or interests of the Proponent, or any sub-contractors proposed by the Proponent, may, in the CRE's opinion, give rise to an unresolved conflict of interest in connection with the services described in this RFP. This includes but is not limited to, involvement by a Proponent or any proposed sub-contractors in the preparation of this RFP. If a Proponent is in doubt as to whether there might be a conflict of interest, the Proponent should consult with the CRE Contact Person identified in this RFP.

5. Evaluation

Evaluation of proposals will be by a committee formed by the CRE and may include employees and contractors of the CRE. All personnel will be bound by the same standards of confidentiality. The CRE's intent is to enter into a Contract with the Proponent who has the highest overall ranking based upon such an evaluation.

6. Debriefing

At the conclusion of the RFP process, all Proponents will be notified. Unsuccessful Proponents may request a debriefing meeting with the CRE. CRE may, in its sole discretion provide such debriefing, at which time, CRE may advise the proponent in a general manner, of the reason for the non-acceptance of the proponent's proposal. Only that proponent's proposal will be reviewed.

7. Alternative Solutions

If alternative solutions are offered, please submit the information in the same format, as a an appendix.

8. Changes to Proposals

By submission of a clear and detailed written notice, the Proponent may amend or withdraw its proposal prior to the

Request for Proposals – Event Planning/Management

closing date and time. Upon closing time, all proposals become irrevocable. The Proponent will not change the wording of its proposal after closing and no words or comments will be added to the proposal unless requested by the CRE for purposes of clarification.

9. **Proponents' Expenses**

Proponents are solely responsible for their own expenses in preparing a proposal and for subsequent negotiations with the CRE, if any. If the CRE elects to reject all proposals, the CRE will not be liable to any Proponent for any claims, whether for costs or damages incurred by the Proponent in preparing its proposal, loss of anticipated profit in connection with any final Contract, or any other matter whatsoever.

10. **Limitation of Damages**

Further to the preceding paragraph, by submitting a proposal, the Proponent agrees that it will not claim damages for whatever reason relating to the Contract or in respect of the competitive process, more than an amount equivalent to the reasonable costs incurred by the Proponent in preparing its proposal. Furthermore, by submitting a proposal the proponent further agrees to and hereby waives any claim for damages, loss of profits or loss of opportunity if no contract is made between CRE and the proponent for any reason.

11. **Proposal Validity**

Proposals will be open for acceptance for at least 120 days after the closing date.

12. **Firm Pricing**

Prices will be firm for the entire Contract period unless this RFP specifically states otherwise.

13. **Currency and Taxes**

Prices quoted are to be in Canadian dollars, inclusive of duties where applicable; and exclusive of the Goods and Services Tax (GST).

14. **Completeness of Proposal**

By submitting a proposal, the Proponent warrants that if this RFP is to design, create or provide an event or manage an event, all components required to run the event or manage the event have been identified in the proposal or will be provided by the Contractor at no charge.

15. **Sub-Contracting**

The use of a sub-contractor must be clearly defined in the proposal. This includes a joint submission by two Proponents having no formal corporate links. In such a case, one of the Proponents must be prepared to take overall responsibility for successful performance of the Contract and this must be clearly defined in the proposal.

Where applicable, the names of approved sub-contractors listed in the proposal will be included in the Contract. No additional sub-contractors will be added nor other changes made to this list in the Contract without the written consent of the CRE.

16. **Acceptance of Proposals**

This RFP should not be construed as an agreement to purchase goods or services. The CRE is not bound to enter into a Contract with the Proponent who submits the lowest priced proposal, or with any Proponent. Proposals will be assessed in light of the evaluation criteria. The CRE will be under no obligation to receive further information, whether written or oral, from any Proponent.

Neither acceptance of a proposal nor execution of a Contract will constitute approval by the CRE of any activity contemplated in any proposal that requires any approval, permit, or license pursuant to any federal, provincial, regional district or municipal statute, regulation or by-law.

17. **Definition of Contract**

Notice in writing to a Proponent that it has been identified as the successful Proponent and the subsequent full execution of a written Contract will constitute a Contract for the goods or services. No Proponent will acquire any

Request for Proposals – Event Planning/Management

legal or equitable rights or privileges relative to the goods or services until the occurrence of both such events.

18. Contract

By submission of a proposal, the Proponent agrees that should its proposal be successful, the Proponent will enter into a Contract with the CRE. The CRE shall have the right to extend this Contract upon written notice to the Contractor.

19. Contract Negotiation and Award

Following the evaluation and recommendation of the evaluation committee, the CRE may select one or more Proponents to enter into negotiations for a Contract or Contracts as follows:

- a) The CRE may elect to divide the Services into more than one Contract, and enter into negotiations with a Proponent with respect to a portion of the Services, and award more than one Contract with respect to the Services;
- b) If a written Contract cannot be negotiated within thirty days of notification of the successful Proponent, the CRE may at its sole discretion at any time, thereafter, terminate negotiations with that Proponent by written notice and either negotiate a Contract with the next qualified Proponent or choose to terminate the RFP process and not enter into a Contract with any of the Proponents. The foregoing process may be undertaken and/or repeated until either a Contract or Contracts are awarded by CRE or until negotiations have been terminated by the CRE; and
- c) CRE reserves the right to negotiate additional services of a similar functional or technological nature from the successful Proponent without further competitive procurements.

20. Liability for Errors

While the CRE has used considerable efforts to ensure information in this RFP is accurate, the information contained in this RFP is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by the CRE, nor is it necessarily comprehensive or exhaustive. Nothing in this RFP is intended to relieve Proponents from the responsibility of conducting their own investigations and research and forming their own opinions and conclusions with respect to the matters addressed in the RFP. Proponents will be solely responsible to ensure their proposal meets all requirements of the RFP, to advise CRE immediately of any apparent discrepancies or errors in the RFP, and to request clarification if in doubt concerning the meaning or intent of anything in the RFP.

21. Modification of Terms

The CRE reserves the right to modify the terms of this RFP at any time in its sole discretion. This includes the right to cancel this RFP at any time prior to entering into a Contract with the successful Proponent.

22. Ownership of Proposals

Proposals submitted to the CRE become the property of the CRE. They will be received and held in confidence by the CRE.

Request for Proposals – Event Planning/Management

23. Use of RFP

Any portion of this document or any information supplied by the CRE in relation to this RFP may not be used or disclosed for any purpose other than for the submission of proposals. Without limiting the generality of the foregoing, by submitting a proposal, the Proponent agrees to hold in confidence all information supplied by the CRE in relation to this RFP.

24. No Lobbying

Proponents must not attempt to communicate directly or indirectly with any employee, contractor, or representative of the CRE, including board members and any officials of the CRE, or with members of the public or the media, about the services described in this RFP or otherwise in respect of the RFP, other than as expressly directed or permitted by the CRE.

25. Collection and Use of Personal Information

Proponents are solely responsible for familiarizing themselves, and ensuring that they comply, with the laws applicable to the collection and dissemination of information, including resumes and other personal information concerning employees and employees of any sub-contractors. If this RFP requires Proponents to provide the CRE with personal information of employees who have been included as resources in response to this RFP, Proponents will ensure that they have obtained written consent from each of those employees before forwarding such personal information to the CRE.

26. Proponents Meeting

CRE may at their option require Proponents to attend a Proponent's meeting and site visits to clarify the requirements as written in the RFP. Proponents will be advised when the meetings and site visits will occur.

27. Working Language

The working language of the CRE is English and all responses to the RFP will be in English.

Appendix B- Evaluation Criteria

Corporate Criteria:

ID	Area	Question
1	Corporate	How long has your company been in business?
2	Corporate	Proponent’s references (name, address, telephone number & email). CRE’s preference is to have a minimum of three references. Provide contact information and names of corporate clients that Proponent has recently supplied same or similar Services.
3	Corporate	Full legal name of business, GST number, and incorporation number (if applicable).
4	Corporate	If you are a sole proprietor, please indicate if you have other client(s) other than CRE (should you be the successful Proponent)?
5	Corporate	Are you able to demonstrate your firm’s financial stability and viability? CRE may request the appropriate documentation at a later date.

Financial Criteria:

ID	Area	Question
1	Financial	<ol style="list-style-type: none"> 1. Please provide your fee structure to be charged. 2. Provide a breakdown of fee structure. 3. GST to be on a separate line.
2	Financial	If applicable, please identify travel cost and any incidental expenses that are anticipated on a separate line(s).

Event Criteria:

ID	Area	Question
1	Event	Provide a sample of past events (within 8 years) that your firm has been tasked with which showcases your capabilities of handling both small- and large-scale events.
2	Event	Give examples of previous experience running agriculture events with livestock.
3	Event	Give examples of previous free community events.
4	Event	Give examples of when an event didn’t turn out exactly how you had planned and how you responded to that situation.
5	Measure	How do you measure a successful event?

Request for Proposals – Event Planning/Management

Service/Technical Criteria:

ID	Area	Question
1	Experience	All of CRE's events are held in Camrose, Alberta – please provide examples of past relevant Central Alberta project experience.
2	Experience	Provide a description of the approach and methodology taken to perform the services indicated in this document. Please include specifications and requirements.
3	Experience	Describe any difficulties or challenges that are anticipated in providing the services and how your firm will manage them. CRE is looking for a firm who will be able to anticipate any potential challenges which may arise and plan for it.
4	Experience	List resources who would be allocated to this project. Include copies of their CV highlighting experiences pertaining to the deliverables described in this document.
5	Desirables	Demonstrated ability to produce high quality deliverables. Please provide examples of past projects to support this.
6	Desirables	Demonstrates strong interpersonal skills and ability to work collaboratively and effectively with others in a community-oriented organizational environment. Please provide examples of past projects to support this.
7	Desirables	Demonstrated ability to work independently. Please provide examples of past projects to support this.
8	Desirables	Demonstrated degree of flexibility and openness. Please provide examples of past projects to support this.
9	Value Add	Indicate any value-added services offered. These services include any skillset, abilities or service(s) that may add overall value to the project that was not been previously requested in this document nor inherent in the delivery of said service(s).