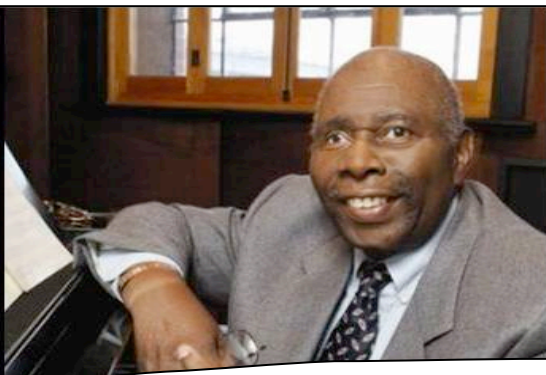




PEI JAZZ & BLUES FESTIVAL

REQUEST FOR PROPOSALS

STRATEGIC PLAN PEI JAZZ & BLUES FESTIVAL



THE CLIENT:

100570 PEI Inc. is a not-for-profit company dedicated to stimulating and sustaining a supportive environment for jazz, blues and related styles of music. This is accomplished through a marquee event - the **TD PEI Jazz & Blues Festival**, educational workshops and outreach activities in multiple venues throughout Prince Edward Island.

The **TD PEI Jazz & Blues Festival**, educational workshops and outreach activities are managed by a volunteer Board of Directors and operationalized by two professional Event Coordinators.

BACKGROUND:

The **TD PEI Jazz & Blues Festival** grew out of an alliance of young music students and Victoria Street Merchants. The aim of this alliance was to provide employment and performance experience to the students, while creating an appealing atmosphere for the merchant's clientele.

Since its inception in 2005, the **TD PEI Jazz & Blues Festival** has evolved into a province-wide, multi-day venue that features performances by local, national and international artists. The Festival appeals to Jazz and Blues enthusiasts, music enthusiasts, young musicians and tourists alike.

Through its affiliations with other festivals and events, the **TD PEI Jazz & Blues Festival** has become an established and important venue for tourists and residents alike. The Festival's successes have enabled it to build a solid reputation with growing audiences and artists.

The **TD PEI Jazz & Blues Festival** has reached a milestone in its relatively short history. The future growth and development of the Festival is a priority for its Board of Directors, who wish to engage the services of a qualified consultant(s) to lead in the development of a strategic plan for long term sustainability.

ASSIGNMENT:

The **TD PEI Jazz & Blues Festival** is requesting proposals from qualified consultants to lead in the development of a strategic plan for long term sustainability.

The strategy plan would "assess and pose solutions" in four key areas including (i) locations and event venues; (ii) timing of the Festival to maximize partnerships, sponsorships, audiences and gated receipts; (iii) sales, marketing and merchandising activities; and (iv) the Festival's programming, workshops and outreach activities. In completing this assignment, an examination and application of the practices deployed by similar festivals and events (i.e., Harvest Jazz and Blues Festival, Fredericton, NB) is expected.

The consultant(s) must be prepared to initiate the processes required to complete this assignment immediately upon award of contract and must become “familiar” with the **TD PEI Jazz & Blues Festival’s** programming, venues, sales and marketing activities, education workshops, outreach activities, etc. This will require the consultant(s) to work closely with the **TD PEI Jazz & Blues Festival’s** Board of Directors and Event Coordinators on all aspects of the assignment.

The consultant(s) must demonstrate considerable experience directly related to the assignment, and must provide a minimum of three references for which similar services had been provided. References should contain a contact name, telephone number and a brief description of the projects and the services provided by the consultant(s). **TD PEI Jazz & Blues Festival** reserves the right to contact any of the references provided.

SCOPE OF WORK:

1. Immediately following the award of contract, the consultants will meet in person with the **TD PEI Jazz & Blues Festival’s** Board of Directors and Event Coordinators to review the scope and objectives of this assignment, as well as the Board’s long term vision for the **TD PEI Jazz & Blues Festival**. During this meeting, timelines and milestones will be established as will project deliverables. A review of the consultant’s work plan will be completed and the resources required to complete the assignment will be identified.
2. Following this meeting, the consultants will initiate an analysis of the **TD PEI Jazz & Blues Festival’s** venues, sales and marketing activities, workshops and outreach activities. This analysis will identify the Festival’s core strength and weaknesses. The results of this assessment will be presented to the Festival’s Board of Directors and Event Coordinators for their review and input.
3. Equipped with their knowledge of the **TD PEI Jazz & Blues Festival**, the consultant(s) will undertake a strategic options analysis by reviewing the operational, sales, marketing, ticketing, sponsorship, venue, programming, workshop, and outreach practices being deployed by similar festivals in other jurisdictions. The consultant(s) will identify how these practices can be applied to the **TD PEI Jazz & Blues Festival** to achieve long term sustainability and to create a supportive environment for stimulating jazz, blues and related styles of music. The outcomes of this analysis will be presented to the Festival’s Board of Directors and Event Coordinators for their review and input.
4. Based on the information collected from the comprehensive analysis, strategic options analysis and input provided by the Festival’s Board of Directors and Event Coordinators, the consultant(s) will prepare and submit a draft report of the strategic plan. Upon the incorporation of input from the Board and Event Coordinators, a final draft will be prepared.
5. The consultant(s) may be required to prepare, present and defend the strategic plan to a larger, stakeholder audience at a date and location to be determined. This presentation would be in PowerPoint format.

DELIVERABLES:

The consultant(s) will provide the **TD PEI Jazz & Blues Festival's** Board of Directors and Event Coordinators with an actionable strategic plan for the long term sustainability of the Festival. The strategic plan will provide an informed perspective on (i) venues and locations for the **TD PEI Jazz & Blues Festival's** performances; (ii) the timing of the Festival to maximize partnerships, sponsorships and audiences; (iii) sales, marketing and merchandising strategies and tactics to optimize awareness, attendance and revenues; (iv) programming, educational workshops for jazz and blues artists and audiences, and related outreach activities that will stimulate and sustain a supportive environment for jazz, blues and related styles of music in Prince Edward Island.

CONTRACTING:

A budget of \$5,500 has been established for this assignment. This amount is inclusive of all taxes and travel. Submissions will be evaluated according to Appendix 1. Submissions in excess of the budget may be excluded from the RFP process. The timelines established for the **TD PEI Jazz & Blues Festival** are as follows:

Proposal due date:	5:00 p.m. (Atlantic Time) on January 31, 2012
Project award:	5:00 p.m. (Atlantic Time) on February 7, 2012
Project Completion:	5:00 p.m. (Atlantic Time) on March 20, 2012

The contracting authority for the **TD PEI Jazz & Blues Festival** is:

Doug Millington
TD PEI Jazz and Blues Festival
116 England Circle
Charlottetown, PE
C1E 1V7

E-mail: doug@pei.sympatico.ca
Tel: 902-894-7131

Other terms and conditions for the **TD PEI Jazz & Blues Festival** are outlined in Appendix 2.

Appendix 1

Proposal Evaluation Scoring Grid

Proposal Scoring

Work (Maximum 40 points)		
a)	Understanding of the study and scope including peripheral problems (Max. 15 points)	
	Proposal does not demonstrate understanding of scope and peripheral problems	0 – 4 points
	Proposal demonstrates some deficiencies in the understanding of the scope and peripheral problems	5 – 9 points
	Proposal demonstrates clear understanding of the scope and peripheral problems; all aspects of the work are addressed	10 – 15 points
b)	Proposal approach and methodology to conduct the study (Max. 15 points)	
	Approach and methodology not clearly outlined / demonstrated; does not address all aspects of the work to be completed	0 – 4 points
	Approach and methodology is outlined, addresses most aspects of the work to be completed	5 – 9 points
	Approach and methodology is clearly outlined and addresses all aspects of the work to be completed	10 - 15 points
c)	Proposed schedule to conduct the study (Max. 10 points)	
	Schedule of the work to be completed does not meet proposed deadline in RFP	0 – 3 points
	Schedule of the work to be completed meets proposed deadlines; however, some aspects do not appear to have adequate time allocated.	4 – 7 points
	Schedule demonstrates adequate time for completion of all aspects of the work to be completed.	8 – 10 points

COMMENTS:

Total points = _____

Weighting Factor = 2

Weighted Score – Work = _____

Staffing Proposal Evaluation Criteria

Staff (Maximum 30 points)		
a)	Project Manager: qualifications, position within the organization and experience in the major elements of the study (Max. 15 points)	
	Project Manager has no relevant previous experience in the major elements of the study	0 points
	Project Manager has minimal (1-3 years) previous experience in the major elements of the study	1 – 5 points
	Project Manager has moderate (more than 3 but less than 5 years) previous experience in the major elements of the study	6 – 9 points
	Project Manager has extensive (5 years or more years) previous experience in the major elements of the study	10 – 15 points
b)	Key professional personnel to be employed on the study: number, qualifications and experience in the major elements of the study (Max. 15 points)	
	Key professional personnel on the study have no relevant previous experience in the major elements of the study	0 points
	Key professional personnel have minimal (1-3 years) previous experience in the major elements of the study	1 - 5 points
	Key professional personnel on the study have moderate (more than 3 but less than 5 years) previous experience in the major elements of the study	6 – 9 points
	Key professional personnel on the study have extensive (5 or more years) previous experience in the major elements of the study	10 – 15 points

COMMENTS:

Total points = _____

Weighting Factor = 1.5

Weighted Score – Staff = _____

Company (Maximum 30 points)		
a)	Corporate information to demonstrate that the company has sufficient human resources and facilities to complete the study (Max. 10 points)	
	The company demonstrates limited capacity / resources available to complete the study	0 – 4 points
	The company demonstrates adequate capacity / resources to complete the study	5 – 10 points
b)	Experience and reputation of the company with similar studies (Max. 10 points)	
	The company demonstrates no previous relevant experience in the major elements of the study	0 points
	The company demonstrates minimal (1-3 years) experience in the major elements of the study	1 – 3 points
	The company demonstrates moderate (more than 3 but less than 5 years) experience in the major elements of the study	4 – 6 points
	The company demonstrates extensive (5 years or more) experience in the major elements of the study	7 – 10 points
c)	General format and appearance of the proposal and its content (Max. 10 points)	
	The proposal is not presented in a logical sequence, no use of graphics, poor vocabulary	0 – 3 points
	The proposal is logical, but may be unclear. Minimal use of graphics; some grammatical errors	4 – 6 points
	The proposal is logical and concise, good use of graphics, professional presentation, appropriate vocabulary with minimal errors	7 – 10 points

COMMENTS:

Total points = _____

Weighting Factor = 1

Weighted Score – Company = _____

Scoring Summary	Weighted Score
Weighted Score – Work (Maximum 80 points)	
Weighted Score – Staff (Maximum 45 points)	
Weighted Score – Company (Maximum 30 points)	
Total Weighted Score (Maximum 155 points)	

Appendix 2

Other Terms and Conditions

OTHER INFORMATION:

1. Proposals received on or before the stipulated closing date and time will become the property of the **TD PEI Jazz & Blues Festival** and will not be returned. All proposals shall be treated as confidential.
2. There shall be no payment by the **TD PEI Jazz & Blues Festival** for costs incurred by the proponent in the preparation and submission of a proposal in response to this RFP.
3. The **TD PEI Jazz & Blues Festival** reserves the right to reject or authorize for utilization any offer in whole or in part, with or without further discussion or negotiation.
4. The **TD PEI Jazz & Blues Festival** reserves the right to amend this requirement or cancel it in its entirety.
5. The **TD PEI Jazz & Blues Festival** reserves the right to seek clarifications on any proposal submitted to facilitate the interpretation of the proposal's content.
6. The **TD PEI Jazz & Blues Festival** reserves the right to enter into negotiations with parties who have submitted acceptable proposals, with the view to establishing an agreement acceptable to the Board of Directors.
7. Submissions must have the proponent's name, bid solicitation closing date and time is clearly visible on your proposal document and packaging. Please direct any requests for clarifications to the content of this RFP solely to the Contracting Authority.
8. Proponents are instructed to respond in their proposal in sufficient depth to permit evaluation against the stated requirements as identified within this document.
9. Proponents must submit their proposal in one document, which contains both a technical proposal and a financial proposal. One hard copy and one electronic copy in PDF format are required.
10. In executive summary format no greater than five (5) pages in length, provide a description of relevant experience and expertise relating to the requested work.
11. In executive summary format, the proponent will provide an approach and proposed methodology for the project. It will be critical to the project that any sources of secondary information, especially which collected from the Internet be creditable and that such information is verified.
12. Identify any limitations in terms of providing the services identified herein inclusive of staffing, service delivery and any other potential limitations.
13. Describe the quality assurance effort to be put in place.
14. Provide three references to which you have provided similar services over the past five years. For each reference, give a contact name and telephone number and a description of the project for which the services were provided. The **TD PEI Jazz & Blues Festival** reserves the right to contact any of the references provided.
15. The bid must address all cost factors that **TD PEI Jazz & Blues Festival** would be subject to during the course of the relationship.

16. The consultants will maintain proper accounting records and submitting invoices that are compliant with the **TD PEI Jazz & Blues Festival's** policies, guidelines and claim procedures.
17. The consultants will arrange for their own travel, accommodations, meals, etc., in accordance with the requirements of the project and the **TD PEI Jazz & Blues Festival's** policies and guidelines.
18. The consultant will prepare and present a final document(s) to the project authority upon completion of the assignment. These documents, along with all supporting materials, etc., will become the sole property of the **TD PEI Jazz & Blues Festival** upon submission of the final report.
19. The consultant will present the final version of the **TD PEI Jazz & Blues Festival** strategy in PowerPoint format to the Board of Directors at a time and location to be announced.