



## **REQUEST FOR PROPOSAL FOR EVENT PLANNER**

**March 2020**

### **Overview**

Southwest Washington Contractors Association (“SWCA”) is seeking a qualified and experienced fundraising event planner (“Event Planner”) to manage the execution of SWCA’s Holiday Party & Fundraiser (“Party”), to be held in Ridgefield, WA at Ilani Casino Resort (“Ilani”) on Friday, December 4, 2020. The Event Planner’s services include, but not limited to concept development, innovating the fundraising portion of the event, planning, event production, and overall event management coordination, including day-of-event coordination, budget management, programming, and event execution. For more detailed information, see Scope of Work section of this Request for Proposal (“RFP”) below.

### **Organizational Information**

SWCA is a 501(c)(6) nonprofit membership organization founded in 1946, that serves as champion of the community; advancing construction through advocacy, partnership, & education. SWCA’s helps its members win more business, become more profitable, train their employees, and build a stronger community.

### **Event Description**

The SWCA Holiday Party & Fundraiser has traditionally been the commercial/industrial construction industry opportunity to celebrate the end of a successful year as well as the Christmas Holiday season together. It’s been a fundraiser, with both a live auction and a silent auction, as well as a paddle raise. Funds raised from the two auctions help support SWCA’s operations, while the paddle raise helps to support the SWCA Foundation’s scholarship and community giving.

The themed party traditionally draws between 400-500 attendees and features a networking reception with butler-served hors d’oeuvres, beer, wine and cocktails. It also has included a silent auction with between 150-200 items and a live auction with 6-8 major auction items and a professional auctioneer. The paddle raise is typically held in the middle of the live auction.

The Party begins with a general reception goes from 5-7 p.m., while the silent auction is also open. Dinner is served at approximately 7:30 and the live auction program begins at approximately 8 p.m.

## **Scope of Work**

The Event Planner will be expected to provide all services necessary and appropriate to manage and execute SWCA 2020 Holiday Party & Fundraiser, including but not limited to the services (“Services”) detailed in this section.

The Services outlined herein is not intended to be exhaustive. The selected Event Planner will be expected to be, among other needed skills: organized; detailed oriented; flexible; an effective verbal and written communicator; calm under pressure; and a negotiator in the best interest of the Party and SWCA.

### **A. Event Management**

- a. Establish regular ongoing communication and provide agendas with SWCA to determine overall look and theme of Party, including the layout and flow of Party, and to ensure effective communications and a collaborative and cooperative process.
- b. Draft, manage and finalize the Party’s project plans, budgets, timelines, deployment schedule and oversee execution of all related tasks
- c. Identify potential challenges and recommend solutions
- d. Serve as liaison with vendors, venues, and other Party stakeholders (“third parties”) and upon SWCA’s written request, serve as proxy for certain matters
- e. Ensure Party complies with applicable laws and regulations
- f. Ensure all authorized agents and/or staff of Event Planner are qualified to perform services in accordance with best industry standards (Event Planner will not subcontract any tasks to third parties without SWCA’s prior written consent)
- g. Exercise duty of loyalty and good faith in favor of SWCA when negotiating with third parties (Event Planner will present all contracts to SWCA for final approval)

## **Deliverables**

- A. Develop and update a detailed project plan for SWCA with estimated delivery dates and agreed upon budget, which details anticipated tasks and required expenses
  - B. Maintain a budget spreadsheet of vendor costs related to the Party
  - C. Secure the best possible pricing for all expenditures relating to the Party, providing documentation (unless waived by SWCA) showing that a competitive, fair and transparent Request for Quotes process was used and followed, where at least three vendors were considered and details supporting the reasoning as to why the selected vendor is ultimately recommended
  - D. Oversee and manage all approved vendor relationships and ensure vendor deliverables are delivered on time and maintain a vendor list as vendors are confirmed
  - E. Manage submission of all vendor invoices to ensure payments can be made by SWCA in a timely manner
  - F. Meet and act as primary point of contact for related vendors, including but not limited to the following:
    - a. Food & beverage
    - b. Production, to include the following:
      - i. Audio visual
      - ii. Lighting
      - iii. Set design & fabrication
      - iv. Décor, including floral
    - c. Branding & design, to include the following
      - i. Printing (bidder cards, table signs, sponsor & other signage, program book, etc.)
      - ii. All fundraiser materials
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- d. Provide SWCA with regular updates of Party progress on timeline
- e. Draft, manage and distribute a complete production schedule for the entire Party, including load in, setup, rehearsals, and strike, to all parties, including but not limited to client, vendors and venue.
- f. Collaborate with SWCA to develop a script outline, gather remarks, and review all audio video content
- g. Provide timing cues to the overall event script to keep program on time, on message and running smoothly
- h. Produce a final script and distribute to participants, including the emcee, in advance of technical rehearsals
- i. Develop a deployment schedule for execution of day of Party and days leading up to Party
- j. Participate in scheduled SWCA Events Committee and Holiday Party Subcommittee meetings (or conference call/virtual meetings) or any additional meetings and/or calls as needed or reasonably requested by SWCA, including scheduling, tastings and walk-throughs
- k. Participate in event debrief within one week of the completion of the event
- l. Submit a post-event evaluation report with recommendations to SWCA
- m. Prepare final expense report for budget reconciliation to include in-kind donations, discounts and actual costs
- n. Identify top-10 donors and provide to SWCA staff within 10 days after event
- o. Identify all donors from paddle raise and provide to SWCA Foundation President & Treasurer within 10 days after event
- p. Other duties as assigned

### **General Management**

- A. Provide general administration, management, day-of execution and manage on-site Party registration
- B. Create weekly reports for follow-ups and identify who should receive the reports
- C. Arrange and manage seating arrangements
- D. Manage the seating process for all guests
- E. Ensure all VIP guests, dignitaries and sponsors are seated appropriately at Party
- F. Ensure all required insurance certificates are obtained and provided to venue
- G. Ensure all required permit applications, if any, are submitted
- H. Recruit, train and supervise all staff and volunteers at Party
- I. Oversee the design, sound, lighting and construction of a set that is appropriate for the venue and the needs of the Party
- J. Oversee the technical layout including video screens
- K. Ensure a full walk-through/rehearsal prior to the Party

### **Sponsorship Fulfillment**

- A. Work with SWCA staff to ensure sponsorship packages are fulfilled appropriately at Party, to include ticket and seat fulfillment for dinner
    - a. Assist with sponsorship strategy
    - b. Assist with sponsor fulfillment benefits
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### **On-Site Management**

- A. Provide a front of house manager to oversee on-site management
  - a. Oversee the on-site registration process
  - b. Oversee setup and strike of equipment, rentals, AV, staging, room setups, signage, sponsors space, registration, gift bags and any other related line items
  - c. Manage volunteers and staff for Party
  - d. If necessary and approved by SWCA, recruit, training and supervise paid staff for positions not filled by volunteers
  - e. Execute the overall direction on Party logistics
  - f. Manage bidder card process, fundraising, SWAG station, etc.
  - g. Determine check out hours and processes

### **Stage Management**

- A. Assign a stage manager and assistant stage manager to oversee the execution of the program.
  - a. Designate a staff member to support all participants before and during the event, including on-site greeting, holding room arrangements, and ensuring smooth program participation
  - b. Draft, update and finalize run of show documents including cue-to-cue
  - c. Oversee the execution of the program
  - d. Assign a director to oversee the execution of all A/V elements in coordination with the stage manager, assistant stage manager and program
  - e. Schedule and manage rehearsals and draft briefing documents for program participants in collaboration with SWCA
  - f. Schedule, manage and supervise all rehearsals, video test runs, complete program rehearsal, performance rehearsals, sound checks, etc.
  - g.

### **Artist Management**

- A. Work with SWCA to support all program participants before and during Party (including any contractor performers)
  - B. Secure and manage air and ground transportation
  - C. Secure and manage hotel accommodations
  - D. Draft and provide briefing information and transportation confirmations
  - E. Provide on-site greetings, assign dressing rooms, and manage holding room including any rider fulfillment
  - F. Procure and manage any necessary backline rentals
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## **Master Services Agreement**

This RFP does not constitute a contract. SWCA will negotiate a Master Services Agreement (“MSA”) with the selected Event Planner.

The MSA will include customary representations and warranties and confidentiality provisions, including a requirement that the Event Planner will ensure that each of its staff, agents, vendors, and other subcontracted third parties sign confidentiality agreements that are at least as protective of SWCA’s confidential and proprietary information as those contained in the MSA. In addition, the selected Event Planner will perform the duties requested as an independent contractor and not as an employee of SWCA.

Once the MSA is fully executed, the Event Planner agrees that it will not accrue additional expenses and remain on budget. The selected Event Planner does not have the authority to incur expenses on SWCA’s behalf without SWCA’s prior written approval.

## **Proposal Format and Guidelines**

- A. Format: Proposals must be received no later than 11:59 p.m. (Pacific) on Thursday, April 9, 2020 via email to [nelson@swca.org](mailto:nelson@swca.org) in a single electronic PDF attachment, with a maximum of 15 pages using 12 point Calibri font with 1-inch margins. PowerPoints are acceptable with the format restrictions.
- B. Guidelines: The proposal shall include the following sections:
  - a. Executive Summary: One-page summary of the Event Planner’s background, past experiences similar to the Services expected for the Party, and basic understanding of the Services required, and reasons why the Event Planner should be selected
  - b. Company Overview: Overview of the Event Planner’s business organization structure, including the following:
    - i. Evidence of valid Clark County Business License
    - ii. Total full-time and part-time employees of the Event Planner
    - iii. Whether the Event Planner has been involved in any disputes with former or current employees and/or vendors (if the matter is settled and is confidential, please provide a general description of the basis of the dispute)
    - iv. Whether the Event Planner has been involved with a dispute with one of its clients regarding event planning services (if the matter is settled and is confidential, please provide a general description of the dispute)
    - v. Total number of substantially similar events in Clark County to the service requested during the past three years
    - vi. Whether the Event Planner has experienced any significant organizational developments (e.g. merger, reduction, acquisition, etc.) during the past three years.
  - c. Event Planning Team: Name and short biography of each individual who will be involved with the Party and their role before, during and after the Party.
  - d. Fees: Provide (1) proposed project based fixed fee, including description of all costs and fees the Event Planner propose to charge SWCA, and (2) hourly rates of the event member planning team.
  - e. References: List of at least three events in Clark County, substantially similar to the Party, including (1) description of the event (including size of event, format of event, type of guests hosted, stage settings built, etc.) and (2) references for each whom the Event Planner has performed similar event planning services (names, address, email and contact number).
  - f. Samples: Sample of previous work related to the services (e.g. final report, event production timeline with pre/during/post deliverables, event budgets which include all

- anticipated costs and fees, project plans, photos, etc.)
- g. Other Information: Any additional information that Event Planner believes will be relevant to the RFP and the Event Planner's capability to provide the Services.
  - h. Signature: The proposal must be signed by a representative of the Event Planner that is authorized to commit on behalf of the Event Planner.

### **Proposal Evaluation**

SWCA reserves the right to accept or reject any and all proposals, without prior discussions, and grant final acceptance to the proposal that best meets the needs and interests of SWCA, in its sole discretion. SWCA will be the sole judge of whether a proposal meets the required RFP criteria.

### **Confidentiality**

Any information disclosed by SWCA herein (and any related correspondence and/or attachments) is considered confidential and constitutes the proprietary information of SWCA. All submission will become the property of SWCA and will be treated as confidential between SWCA and the Event Planner. SWCA will use its commercially reasonable efforts not to disclose the contents of the Event Planner's proposal to other participants or the public. SWCA reserves the rights to discuss the submissions with its consultants, references provided by the Event Planner, and other related parties during the evaluations process.

### **Acknowledgement**

By submitting a proposal, the Event Planner acknowledges that it has read this RFP, understands it, and agrees to be bound by its requirements.

Event Planner understands and agrees that they are solely responsible for its own business expenses, except for pre-approved, reasonable business expenses related to the Gala, such as travel accommodations.

Event Planner agrees to keep their fixed fee and other terms of their engagement open for at least sixty (60) days past the submission deadline.

Once the Event Planner is selected, SWCA and the selected Event Planner must execute an MSA prior to the selected Event Planner commencing services. The Event Planner agrees that the MSA will be a complete and exclusive agreement and will supersede all prior communications between the parties.

Should SWCA and the selected Event Planner be unable to agree on the terms of an MSA within a reasonable time (at SWCA's sole discretion), SWCA reserves the right to suspend or terminate negotiations without notice, and to pursue negotiations with another Event Planner. Any suspension or termination of negotiations shall be without liability to SWCA or the selected Event Planner(s).

SWCA may terminate this process (in its sole discretion) and issue a new RFP for the requested services.

Each Event Planner shall assume all fees and costs (including but not limited to legal fees) incurred in responding to this RFP and negotiating the MSA with SWCA. SWCA shall bear no liability for any costs, fees, or liability incurred in connection with this RFP or any responses thereto.

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Event Planner agrees that it shall not directly contact any SWCA Board members, Events Committee members or those who may otherwise have an affiliation with SWCA, in connection with responding to this RFP. Event Planners who do not abide by this requirement may be disqualified from the RFP process.

**Questions**

Questions about this RFP should be directed to Nelson Holmberg, Executive Director by email ONLY: [nelson@swca.org](mailto:nelson@swca.org). Phone calls will not be accepted. All questions and SWCA answers will be made available to all potential Event Planners, upon written request.