



Request for Proposals

Specialty Coffee Association of America

Request for Proposal for Regional Skill Building Workshop Hosts

RFPID: RSBW1011

June 4, 2010



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1 Statement of Work

1.1 Purpose

The purpose of this Request for Proposal (RFP) is to invite prospective host candidates to submit a proposal to become a host of a Regional Skill Building Workshop in the SCAA North West, North East, and South East Regions for the Specialty Coffee Association of America (SCAA). This RFP provides host candidates with the minimum requirements and hosting criteria.

1.2 Coverage & Participation

The intended coverage of this RFP, and any agreement resulting from this solicitation, shall be for the use of all departments at SCAA. SCAA reserves the right not to enter into any contract, to add and/or delete elements, or to change any element of the coverage and participation at any time without prior notification and without any liability or obligation of any kind or amount.

2 General Information

2.1 Original RFP Document

SCAA shall retain the RFP, and all related terms and conditions, exhibits and other attachments, in original form in an archival copy. Any modification of these, in the host candidate's submission, is grounds for immediate disqualification.

2.2 The Organization

SCAA is the world's largest coffee trade association, with over 2,000 member companies and a mission to recognize, promote, and develop Specialty Coffee. We operate educational activity in 6 official SCAA Regions, (see regional list below) on an annual basis. Our Regional Skill Building Workshop Program (RSBW Program) is designed to bring SCAA educational courses to each of the 6 regions annually. We depend on a local host in each region to maximize grassroots outreach and ensure a successful event.

The objectives of the RSBW Program are:

- Deliver up to 5 RSBW events and one annual Symposium & Exposition ("The Event"), bringing coffee education to each of SCAA's 6 regions annually. For 2010-11, The Event will take place in the South Central region, and therefore there will not be an RSBW in this region during the same year.



- Develop community in each region, every year, strengthening relationships and business ties among our members
- Recruit new SCAA, Roasters Guild (RG), and Barista Guild of America (BGA) members
- Provide value to members through registration fee discounts
- Recruit attendees and volunteers for upcoming SCAA activities, such as Regional Barista Competitions, the United States Barista Championship, the Roasters Guild Retreat, Roasters Guild Origin Trips, and the annual SCAA Event
- Provide year-round access points to certification-driven Skill-Building content for Barista Certification, Roaster Certification, and Golden Cup Technician Certification
- Grow the population of SCAA certified skilled professionals

2.3 Existing Environment

The 6 SCAA Regions are:

North East: OH, WV, MA, DE, PA, NJ, NY, CT, RI, ME, VT, NH, MD

South East: KY, VA, TN, NC, SC, AL, GA, FL, DC

North Central: ND, SD, NE, MN, IA, WI, IL, IN, MI

South Central: KS, MO, OK, TX, AR, LA, MS

North West: WA, OR, AK, ID, MT, WY

South West: HI, CA, NV, AZ, UT, NM, CO

During the 2010-11 year, our Annual Event, the SCAA Symposium & Exhibition will take place in Houston, TX, which satisfies the requirements for educational workshops in the South Central Region. SCAA will host an event at our headquarters in Long Beach, CA, which will qualify as the RSBW for the South West Region. The North Central Region had an RSBW in May 2010 in Ann Arbor, MI. Therefore, for the remainder of the 2010-11 year, we are seeking hosts for 3-day RSBW events in the North West, North East, and South East regions only.



2.4 Schedule of Events

The following is the schedule that will apply to this RFP, but may change in accordance with the organization's needs or unforeseen circumstances. Changes will be communicated by e-mail to all host candidates.

Issuance of RFP	Thursday, June 24, 2010
Clarifying Questions Due	Wednesday, June 30, 2010, 5:00 PM PST
RFP Closes	Friday, July 9, 2010, 5:00 PM PST
Award Notification	Monday, July 12, 2010

3 Proposal Preparation Instructions

3.1 Host candidate's Understanding of the RFP

In responding to this RFP, the host candidate accepts full responsibility to understand the RFP in its entirety, and in detail, including making any inquiries to SCAA as necessary to gain such understanding. SCAA reserves the right to disqualify any host candidate who demonstrates less than such understanding. Further, SCAA reserves the right to determine, at its sole discretion, whether the host candidate has demonstrated such understanding. That right extends to cancellation of award, if award has been made. Such disqualification and/or cancellation shall be at no fault, cost, or liability whatsoever to SCAA.

3.2 Good Faith Statement

All information provided by SCAA in this RFP is offered in good faith. Individual items are subject to change at any time. SCAA makes no certification that any item is without error. SCAA is not responsible or liable for any use of the information or for any claims asserted there from.

3.3 Communication

Verbal communication shall not be effective unless formally confirmed in writing (electronic or traditional) by the Director of Professional Development (Ellie Matuszak). In no case shall verbal communication govern over written (electronic or traditional) communication.

- 3.3.1 **Inquiries, Questions, Clarification.** Inquiries, questions, and requests for clarification related to this RFP are to be directed via email to:

Ellie Matuszak
SCAA Director of Professional Development
Email: elliem@scaa.org



Phone (for questions/clarification only): (424) 634-2025

Or

Marcus Boni
SCAA Director of Community
Email: mboni@scaa.org

- 3.3.2 **Addenda:** SCAA will make a good-faith effort to provide an email response to each question or request for clarification that requires addenda within 3 business days. All questions, answers, and addenda will be shared with all recipients.

3.4 Proposal Submission

Completed Proposals must be delivered via PDF format email attachment to:

Ellie Matuszak, Director of Professional Development
Specialty Coffee Association of America
elliem@scaa.org

on or prior to Friday, July 9, at 5:00 PM Pacific Time.

3.5 Criteria for Selection

The evaluation of each response to this RFP will be based on its demonstrated compliance, format, and organization.

Evaluation Criteria:

1. Compliance of all items as outlined in “Minimum Facility Requirements” (see section below “Scope of Work, Specifications, and Requirements” for specific requirements)
2. Specific information according to “Proposal Submission” guidelines (section 5) below
3. Availability of dates to host the workshop between September 6, 2010 and December 31, 2010 in one of the three regions (North West, North East, and South East)
4. Marketing plan, specifically marketing strategies to engage a local audience



5. SCAA membership
6. Maximum ability to provide supplies as outlined in supply lists (see below).

3.6 Selection and Notification

Host candidates who possess the capacity to compete for this contract will be selected to move into the consideration phase of this process. Written notification will be sent to these host candidates via email. SCAA will notify any host candidate company that submits a Proposal regardless of whether the Proposal is selected.

4 Scope of Work, Specifications & Requirements

4.1 Functional Requirements

Venue Criteria	Quantities, Additional Requirements and Notes
Venue	Indoors (Climate Controlled)
Workshop Area	(2) Room minimum (Class and Lobby)
Square Footage	35'x35' (minimum) per course offered (not including Lobby)

Venue Criteria	Quantities, Additional Requirements and Notes
A/V	(1) LCD Projector (1) Projection Screen (1) Podium (1) A/V Cart
Disabled persons	The location should be free of physical restrictions as to who can enter the event.
Public Transportation	Municipal public transportation and/or access to local taxi service should be located within a two-mile radius of the workshop facility.
Equipment Technical Support	Technical support to set-up and break down equipment; at least one technician must be present for entire workshop in case of an emergency
Airport	No More than 45 min away from a major airport with adequate airlift

Venue Criteria	Quantities, Additional Requirements and Notes
Legal Liabilities	The host is legally responsible for the production of the entire SBW. The host must provide general liability insurance that covers the entire event (see 4.1.2 "Insurance" below)
Tables 8'30" (w/ black plastic skirts and tops)	15 (minimum)
Chairs	25, with backs
Water	Water quantities vary by class- host agrees to comply with individual water requirements for all courses selected. All water must be calibrated to meet the SCAA Water Standard SCAA Water Protocols - CLICK HERE
Supplies	Supply Requirements vary by course- host agrees to comply with individual supply requirements for all courses selected. Please see "Supply Lists" document for specific information
Drainage	Hard lined or 5-gallon water bottles



4.1.2 Insurance Specifications

Host agrees to maintain adequate insurance to fully protect SCAA staff and its affiliates, co-sponsors, service contractors etc and its management from any and all claims arising from the Host's activities including, but not limited to, the installation, operation and dismantling of host and vendor displays and equipment. The foregoing insurance requirement includes claims under the Worker's Compensation Act or for personal injury, death, or for damage to property. Host understands that neither SCAA, nor the facility maintains insurance covering the host's property, unless otherwise arranged and it is the sole responsibility of the Host to maintain such insurance. Host is responsible for any and all damages caused by the Host or Host's agents, employees or guests. Host agrees to indemnify, defend and hold harmless the SCAA, Contracted Sponsors, Facility and vendors and all of their partners, affiliates, agents and employees from and against any liability for loss or damage of any kind which Host may directly or indirectly cause.

4.2 Technical Specifications

SCAA makes every effort to confirm electrical requirements in advance of each workshop, however electrical specifications are based on manufacturer-provided information and facility should be prepared and able to accommodate on-site adjustments, including potential additions to the stated electrical requirements.

(see chart below)

Equipment Required	Notes	Requirements Apply for Courses Using Each Room Arrangement (indicated with "X")				Minimum Electrical Requirements
		Cupping	Brewing	Espresso	Sensory Analysis	
Flojets		X	X		X	Voltage: 115 or 230 VAC 12 Vdc Amp Draw: 12 Volt 3.0 Amps. Max. 115 Volt 0.5 Amps. Max. 230 Volt 0.25 Amps. Max.
Auto-drip Brewers	Alternately use of 48-ounce French Presses and hot water kettles/tower is acceptable (not required for CP254)		X		X	Provided by manufacturer, but facility should be prepared for on-site adjustments, including electrical needs

Equipment Required	Notes	Requirements Apply for Courses Using Each Room Arrangement (indicated with "X")				Minimum Electrical Requirements
		Cupping	Brewing	Espresso	Sensory Analysis	
French Presses (optional)	Only required if auto-drip brewers are not available; 12 French Presses required		X			
Bulk Grinder		X	X		X	Voltage: 220-240V / 50Hz / 5.8 Amp 110-115V / 60Hz / 12 Amp Power consumption: 1100 W with 220-240V / 50Hz 1200 W with 110-115V / 60Hz

Equipment Required	Notes	Requirements Apply for Courses Using Each Room Arrangement (indicated with "X")				Minimum Electrical Requirements
		Cupping	Brewing	Espresso	Sensory Analysis	
Espresso Grinder				X		Mahlkoenig: 200-230 V / 50/60 Hz / 1 Other:
Espresso Machines	(2-3 group machines)			X		Volts: 220 (voltage range of 208-240) Watts: 4500 Amp draw: 21 Receptacle: Nema L6-30 Twist
Electric Hot Water Kettles (Bodum)	Only required if hot water tower cannot be provided; needed for Brewing only if French Presses are used	X	X			120 volts 15 amps each

Equipment Required	Notes	Requirements Apply for Courses Using Each Room Arrangement (indicated with "X")				Minimum Electrical Requirements
		Cupping	Brewing	Espresso	Sensory Analysis	
Hot water Tower (10 gallon)	Must include 8-12 pitchers for tableside pouring; needed for Brewing only if French Presses are used	X	X		X	Voltage: 240 Amps: 33.5 Watts: 2 @ 4000 2 wires plus ground service, single phase

4.3 Engagement Methodology

Once a host is selected, the host and SCAA will choose a date for a 3-day event. SCAA will create and manage a registration module and will collect all registration fees according to our current fee structure. For 2010-11 the fee structure is aligned with the pricing for any courses offered at the Annual Event in Anaheim, CA. Please visit scaalexposition.org to see current fee structure. In special cases, alternate fee structures can be arranged. Please indicate any plans for alternate fee structure (i.e., sponsor subsidized) in the Proposal.

Hosts have the option to solicit sponsors to offset any costs incurred for producing the event and do not need to involve SCAA in these transactions (exceptions would be for sponsors who subsidize registration fees which will be invoiced directly by SCAA). However, SCAA will make a good faith effort to recognize any additional sponsors of the event in SCAA social media and signage, permitting reasonable time frame, availability of staff resources, and availability of logo files, etc. Recognition of sponsors that are secured by the host is not guaranteed.

SCAA will provide social media outreach and promotion for this event. SCAA staff will manage the social media identities through our SCAA Facebook and Twitter identities, and hosts are welcome to work with SCAA to utilize these features but may not create independent social media identities. SCAA staff will also create a press release for each event and will coordinate language and logos with each host.



Hosts are encouraged to design posters, e-blasts, etc, and may use the SCAA and SBW logos to promote the event, and agree to comply with SCAA's Logo Usage policy in using the SCAA Logo on any promotional material.

SCAA and the host will select courses together based on venue availability and coordinating with any other RSBWs and The Event, to ensure a sensible calendar of courses throughout the year that provide maximum value to attendees. Please refer to the document "Current SCAA Courses for RSBW, Summer 2010" for list of available courses.

SCAA will coordinate Lead Instructors for the courses selected from our pool of current holders of the SCAA Lead Instructor Credential. When possible, we will utilize Lead Instructors from the Host Company or as otherwise requested by the Host.

The Host will be responsible for securing station instructors/table leads and other volunteers for the event.

5 Proposal Submission

All host candidates must provide the following information:

1. A brief outline of the host candidate company, including at a minimum:
 - Full legal name of the company
 - SCAA Membership Category
 - Contact information of authorized Single Point of Contact to coordinate with SCAA (name, telephone number, and email address) about the RFP and the RSBW Event
 - Contact information of other authorized persons to coordinate planning details
2. A statement indicating compliance with all Minimum requirements outlined in section 4 above
3. Marketing Plan for local outreach and recruiting
4. Description of volunteer resources available for the following:
 - Set-up
 - Tear-down



- Assistant instructors
 - Classroom volunteers
5. Description of proposed venue, including physical address
 6. Description of ability to provide supplies as outlined in the document "Supply Lists." Please note that SCAA can often provide supplies when they are not available from the host company, by drop-shipping a pallet from our Long Beach headquarters. Any of these supplies can be purchased or must be returned to SCAA following the event.
 7. Proposed dates (list any available between September 6, 2010 and December 31, 2010)
 8. Course preferences, if any (examples include coursework in BGA or RG Certification tracks, espresso courses only, cupping and espresso, beginning-level, advanced-level, mixed-level, etc. Please refer to document "SCAA Current Courses for RSBW, Summer 2010")
 9. Description of proposed ancillary activities, such as Latte Art Throwdowns or group dinners, to be added to the event (at host's expense)
 10. Any other information that may be relevant in selection, including any value-added options for attendees (for example, lunch included; opportunity to demo new equipment, proximity to interesting activities; opportunity to visit local member company facilities, etc)

6 Additional Terms & Conditions

6.1 Costs

The RFP does not obligate SCAA to pay for any costs, of any kind whatsoever, that may be incurred by a host candidate or any third parties, in connection with submission of a proposal. All host candidates and supporting documentation shall become the property of SCAA, subject to claims of confidentiality in respect of the Response and supporting documentation.

6.2 Use of Logos

Hosts must comply with the SCAA Logo Use policy in any marketing efforts.



6.3 Social Media

The Social Media presence for this event will be created and managed by SCAA staff, with options for joint coordination to provide maximum outreach to the coffee community

6.4 Governing Law

This RFP and the Respondent's Response shall be governed by the laws of California.

6.5 No Liability

SCAA shall not be liable to any Respondent, person, or entity for any losses, expenses, costs, claims, or damages of any kind:

- Arising out of, by reason of, or attributable to, the Respondent responding to this RFP; or
- As a result of the use of any information, error, or omission contained in this RFP document or provided during the RFP process.

6.6 Entire RFP

This RFP, any addenda to it, and any attached schedules, constitute the entire RFP.

7 Host candidate Certification

This certification attests to the host candidate's awareness and agreement to the content of this RFP and all accompanying calendar schedules and provisions contained herein.

The host candidate must ensure that the following certificate is duly completed and correctly executed by an authorized officer of your company.

This proposal is submitted in response to RFP RSBW1011 issued by SCAA. The undersigned is a duly authorized officer, hereby certifies that:

(Host candidate Name)

agrees to be bound by the content of this proposal and agrees to comply with the terms, conditions, and provisions of the referenced RFP and any addenda thereto in the event



of an award. Exceptions are to be noted as stated in the RFP. The proposal shall remain in effect for a period of [Number of Days (#)] calendar days as of [RFP Due Date].

The undersigned further certify that their firm (check one):

- IS
- IS NOT

currently debarred, suspended, or proposed for debarment by any federal entity. The undersigned agree to notify [Organization Name] of any change in this status, should one occur, until such time as an award has been made under this procurement action.

Person[s] authorized to negotiate on behalf of this firm for purposes of this RFP are:

Name: _____ Title: _____
 Signature: _____ Date: _____

Name: _____ Title: _____
 Signature: _____ Date: _____

Signature of Authorized Officer:

Name: _____ Title: _____
 Signature: _____ Date: _____

Thank you for your interest in the SCAA RSBW Program and our mission to recognize, promote and develop specialty coffee!