



Request for Proposals to

Deliver a Master Class Seminar on Wines of Nova Scotia to Key Markets Across Canada

RFP Number: 18-002

Issued By: Canadian Association of Professional Sommeliers –
Atlantic Chapter (CAPS-AC)

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Deadline for Submissions: February 22, 2019 – 11:59 pm AST

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1. Introduction & Background

The Canadian Association of Professional Sommeliers (CAPS) is a pan-Canadian non-profit organization representing the sommelier trade. It has five regional chapters, from coast to coast, representing key influencers in the restaurant trade, journalists, and educators. It is associated with ASI – Association de la Sommellerie Internationale. Comprising 54 member countries, ASI is a global and highly influential sommelier organization. The primary mandate of CAPS is wine, beer, and spirits education and promotion within all aspects of the industry. CAPS' Atlantic Chapter has been very strong in this regard, and offers a comprehensive two-year sommelier program, as well as a Cicerone beer exam preparatory course.

Advanced sommelier education focuses on the details of wine production in major wine producing regions of the world by using master classes as a delivery vehicle. Nova Scotia is expanding its wine footprint, and is increasingly recognized as a major wine region of Canada. Nova Scotia is also famed for its food exports. Digby scallops and Nova Scotia lobster, for example, appear on restaurant menus by name from coast to coast. At present, there is no comprehensive wine course outside of the province which examines and promotes the Nova Scotia food and wine industry.

Our goal is to create a Master Class curriculum featuring the wines and regional food pairings of Nova Scotia, and to present it throughout the Canadian market in seminars across the country. The target market for this Master Class will be sommeliers and trained wine professionals across Canada. The Master Class curriculum has already been developed, under a previous RFP (18-001), and includes a comprehensive student Study Guide, along with a series of PowerPoint presentations that reflect the units of study in the Study Guide.

The objective of this Request for Proposals (RFP 18-002) is to secure a qualified instructor to deliver the Master Class in five (5) pre-selected markets across Canada: Halifax, Montreal, Toronto, Winnipeg, and Vancouver. While cost will be a significant factor, other criteria will form the basis of our award decision. Selection criteria are described in detail in the Evaluation Factors section of this RFP.

2. Submission Guidelines & Requirements

The following submission guidelines and requirements apply to this Request for Proposals:

1. First and foremost, only qualified individuals with relevant prior experience should submit proposals in response to this Request for Proposals.
2. Bidders must include at least two (2) references from previously completed engagements that are of a similar nature to this engagement as part of their response.
3. Bidders must submit a technical proposal that provides an overview of the proposed approach to course delivery as well as a current resume or CV. The technical proposal should include a proposed (tentative) schedule and logistical considerations, as applicable.
4. A cost proposal must also be provided. This cost proposal should indicate the overall fixed price for the engagement, with a high-level breakdown of anticipated cost components.
5. Proposals must be signed and dated by an individual duly authorized to bind the bidder.
6. Proposals must be submitted electronically by 11:59 pm AST on February 22, 2019 to be considered. Proposals should be submitted to CAPS-AC President Cheryl Doherty, at the e-mail address indicated on the cover sheet.
7. If there is more than one qualified candidate, with equally attractive technical and cost proposals, CAPS-AC may request further details or engage potential candidates in more detailed discussions to determine the best candidate.

3. Project Description

As Nova Scotia's wine industry expands, and its products and producers garner national and international attention, we anticipate a growing demand for focused, in-depth knowledge and education on the wines of Nova Scotia. As the representative body for the sommelier trade in Atlantic Canada, spearheading the initiative to develop an advanced level course on the *terroir*, viticultural practices, wines, and wine industry of Nova Scotia is well aligned with CAPS-AC's mandate.

As stated in the introduction, the goal of this initiative is to develop and deliver a professional-quality Master Class curriculum to sommeliers and trained wine professionals across the country, in a seminar format. The seminar will be distributed through the Canadian Association of Professional Sommeliers (CAPS) across Canada, with seminar participants receiving a CAPS-endorsed certificate upon successful completion. To encourage enrollment from our target audience, the Master Class will be offered at no cost to participants. The Master Class will be delivered as a 1-day seminar in each market¹ and will include professional tasting and evaluation of Nova Scotia wines, and extensive discussion on the unique terroir of Nova Scotia.

¹ The seminar duration and daily start/end times in each market to be determined jointly by the instructor, CAPS-AC, and the local CAPS chapter.

4. Scope of Work

CAPS-AC previously hired an education professional to research and design an in-depth curriculum for a Master Class on the wines of Nova Scotia, suitable for an audience of sommeliers and trained wine professionals. The Master Class curriculum includes the following units of study:

1. Introduction to the Wines of Nova Scotia
2. History of Nova Scotia Wine
3. The Geology of Nova Scotia
4. The Climate of Nova Scotia
5. Varietals of Nova Scotia
6. Wine Styles of Nova Scotia
7. Nova Scotia Food and Wine
8. Nova Scotia Wine Industry

With the Master Class curriculum already developed, the scope of this engagement is limited to delivery of the curriculum to seminar participants in five (5) key markets across Canada (Halifax, Montreal, Toronto, Winnipeg, and Vancouver). The instructor will be expected to complete the following tasks/activities:

- Work closely with the local CAPS chapter² in each of the target markets to plan and coordinate the seminars. The local CAPS chapter in each of the target markets will be expected to promote the seminar to their members and industry contacts and manage registration. The local CAPS chapter should also be in position to identify a suitable venue, however the cost of venue rental and provision of lunch for participants must be factored into the instructor's budget. The instructor will need to maintain communication with the local chapter to confirm all seminar logistics.
- Work with the local CAPS chapter to coordinate distribution of course materials (i.e., Study Guides) to all confirmed seminar participants prior to conducting the seminar in each market
- Present each unit in the Study Guide in an efficient and effective manner, using the provided PowerPoint presentations and any other accompanying materials the instructor deems appropriate, ensuring adequate coverage of the important content and concepts in each unit
- Engage and facilitate active discussion with seminar participants on topics related to the Master Class curriculum
- Lead focused tasting, discussion, and assessment of Nova Scotia wines, ideally organized into logically-themed flights
- Provide lunch for all seminar participants

² CAPS-AC will provide necessary contact information for each of the regional chapters and facilitate introductions, as required.

- Provide CAPS-endorsed certificates of completion to each seminar participant at the end of the seminar
- Administer a brief course evaluation (i.e., provide seminar participants with the opportunity to give feedback on the Master Class to inform/improve future seminar delivery)

It is expected that the successful bidder will adequately prepare themselves prior to delivering the seminar, including:

- Thorough review of the Master Class curriculum (Study Guide and associated PowerPoint presentations will be provided to the instructor upon contract award)³
- Familiarization with the wines of Nova Scotia, broadly speaking, and specifically the wines to be sampled during the Master Class seminars⁴

Final acceptance of the project deliverables is contingent on the following acceptance criteria:

1. Seminars delivered successfully in all five (5) target markets within the target timeframe.
2. List of seminar participants in each market submitted to CAPS-AC (i.e., confirmation of seminar attendance in each market).
3. All course evaluations / feedback from seminar participants submitted to CAPS-AC.

³ For reference, a sample chapter of the Study Guide and/or a sample PowerPoint presentation may be made available to potential bidders, upon request.

⁴ List of wines to be sampled during the seminars will be provided to the instructor as soon as possible.

5. RFP & Project Timelines

The Request for Proposals timeline is as follows:

Request for Proposals Issued	February 8, 2019
Deadline to Submit Proposals	February 22, 2019
Selection of Top Bidder / Notification to Unsuccessful Bidders	March 1, 2019
Start of Contract Negotiation	March 4, 2019
Contract Award	March 8, 2019
Target Date for Completion of Project	June 30, 2019

CAPS-AC would like to see the Master Class delivered in all five (5) target markets in Spring 2019. Bidders should propose a suitable schedule to meet this goal.

6. Budget

CAPS-AC's all-inclusive budget for delivery of the Master Class in all five (5) target markets is \$25,000 CAD. This budget needs to cover the instructor's compensation and all associated expenses related to delivery of the Master Class seminar in all five markets, including but not necessarily limited to,

- Travel expenses (e.g., flights, hotels, taxis)
- Venue rental in each market
- Lunch for all seminar participants
- Printing and/or distribution of Study Guides to all seminar participants

Bidders should assume that all of the wine, and associated shipping costs, will be covered by CAPS-AC through industry sponsorship.

Once the successful bidder is selected, a compensation plan will be discussed and agreed upon jointly by CAPS-AC and the instructor.

7. Evaluation Factors

CAPS-AC will rate proposals on the following factors:

1. Candidate's relevant experience, qualifications, and expertise

- Minimum requirement: Sommelier Certificate from CAPS, ISG, or Court of Master Sommeliers; or WSET Diploma
- Prior experience delivering a formal wine course in a professional environment
- Familiarity with the Nova Scotia wine industry
- Familiarity with teaching best practices and effective approaches for engaging adult learners
- Industry experience (restaurant or wine retail) is not mandatory but would be considered an asset

2. Responsiveness to the project goals and project requirements set forth in this Request for Proposals

- Clear demonstration that bidder understands the ultimate goals of the project, as well as the specific requirements of this Scope of Work and the expected outcomes
- Clear demonstration of a logical, well thought-out approach to course delivery, including proposed timelines for delivery of the Master Class in each of the five (5) target markets, planning and logistical considerations, anticipated expenses, etc.

3. Examples of past work

- Bidders must provide at least two (2) examples of past experience in delivering formal wine education that demonstrate the candidate's suitability to instruct the Master Class curriculum on Wines of Nova Scotia.
- References with current contact information should be provided for the above, and will be contacted by CAPS-AC.

4. Cost proposal

- Bidders must submit a fixed cost proposal for the entire scope of work. This cost proposal will include a high-level breakdown of the major cost components (e.g., Instructor's time, anticipated travel expenses, printing costs, catering, etc.).
- Cost proposals should be in Canadian dollars and inclusive of all fees and taxes.

CAPS-AC reserves the right to award to the bidder that represents the best value to CAPS-AC, as determined solely by CAPS-AC in its absolute discretion. Once a successful candidate has been chosen, all bidders will be notified.