



# **Brewers Association Equipment Procurement Guide for Craft Brewers Request for Proposal**

## **Overview**

The Brewers Association (BA) wishes to develop a resource to guide brewers through the equipment selection and procurement process and align expectations between equipment suppliers and brewers. As the number of craft brewers and equipment suppliers continues to grow, it is critical for brewers to have a comprehensive guide to equipment selection to ensure both worker safety and beer quality.

The BA desires to establish clear and understandable guidance for craft breweries, with a specific emphasis on the small producers. The resource will serve as accepted industry procurement practice and establish minimum safety requirements.

The successful vendor will bring substantial experience with equipment selection and procurement and equipment installation. The vendor will also provide guidance that balances realistic needs and expectations from equipment suppliers and brewers alike.

## **Scope of Work**

At the completion of the project, BA will own substantive content addressing equipment selection and procurement for use by and of value to its many diverse members, as well as industry equipment suppliers. BA brewery member operations range in size from very small (<100 bbls annually) to relatively very large (> 2 MM bbls annually) with differing process and packaging procedures. The successful vendor will work with the BA to identify the appropriate deliverables to produce the resource as described.

Examples of the deliverables are:

1. Written content for one manual, delivered to BA creative department in final form as text or MS Word format documents.
2. Graphic content (such as images, charts, tables, spreadsheets, templates, flowcharts, decision trees, audit forms) in formats mutually agreed upon by vendor and BA creative department.
3. Additional content needed for development of one or more web-based resources to be housed on [BrewersAssociation.org](http://BrewersAssociation.org)

## **Work for Hire**

The work product results for this project will be considered “Work for Hire.” All content and resources will become the copyrighted property of Brewers Association for use by BA staff and members at their discretion. Brewers Association will own all copyright to the resulting work product and content.

## **Expectations**

BA requires a vendor who has extensive knowledge with equipment supplier practices in the food and beverage industry and craft brewery best practices. The vendor will be

able to effectively work in collaboration with BA staff, BA Engineering subcommittee and BA member and other breweries. Therefore,

- Vendor will foster a relationship of trust and confidence between themselves and BA.
- Vendor will provide qualified personnel, dedicated to the success of the project.
- Vendor will use their expertise to accomplish the work within the schedule and budget term found in Project Information section.
- Vendor will organize topics with attributes as described in this RFP.
- Vendor will work to identify knowledge gaps, and then fill those gaps.
- Vendor will work to understand the diverse nature of BA membership.

## **Proposal**

Please include the following information in your proposal of 5 pages or less:

1. List and describe individuals on the team who will participate in the project.
2. List similar project experience with references including contact name and email/phone.
3. Describe your approach to meeting the schedule and goals of the project defined in this RFP.
4. Describe how you will reach out to BA member brewers, non-member brewers, and vendors to identify best practices, knowledge gaps, and resources for gathering content.
5. Describe your vision of the manual – approximate length, amount of imagery, etc.
6. Describe what you need from the BA to achieve success.
7. Describe the values by which your company makes decisions.

## **Project Information**

### **Organization and Format**

BA desires that the final printed documents will have the look and feel of similar Brewers Association resources such as [Good Manufacturing Practices for Craft Brewers](#), [Food Safety Plan for Craft Brewers](#) and [Hazard Assessment Principles](#).

### **Tone and Level of Communication**

Concepts and standards will be communicated in a manner that will be understood by and applicable to both:

1. Brewery members who may not be experienced in equipment selection and procurement.
2. Brewery members who have advanced training and experience in equipment selection and procurement.

Verbiage must be developed sufficiently to accomplish this important goal. Concepts and standards will be conveyed with heavy usage of images, diagrams, photos, drawings, templates and sample forms.

### **Attributes**

Final content will contain information applicable to many sizes and types of members. For example, material must be usable by the following brewery types:

- Brewpubs
- Tap Room Breweries
- Small packaging brewing companies (1-15,000 bbls annually)
- Mid-size packaging brewing companies (15,000 - 50,000 bbls annually)
- Bigger regional & national packaging brewing companies (over 50,000 bbls annually)

The resource should address the following topics, specifically:

- Effectively outlining project/equipment needs, including:
  - What the brewery needs – scale, speed, size, throughput, etc.
  - Where the equipment will be placed – height, volume, utilities, etc.
  - When the brewery requires the equipment – expansion, production, etc.
- Internal stakeholders to include in equipment procurement decisions, including:
  - Ownership and Finance
  - Operators and brewery personnel
  - Maintenance and engineering departments/personnel
- Developing a Bidders List
- Developing a Bid Document, including:
  - Front End Document
  - General Arrangement (GA) drawings
  - Equipment specifications
- Building a Bid Comparison Form
- Outlining and understanding terms and conditions, including:
  - Payment terms
  - Required manuals and equipment specs
- Distributing a Request for Proposal
- Conducting a productive site visit
- Finalizing purchase agreements
- Following a project during manufacturing
- Preparing for equipment delivery and installation
  - Hiring contractor
  - Internal installation
- Required support during start-up and initial operation
- Develop equipment specific examples / specifications in appendix form
- Include a glossary of relevant terms and acronyms

The resource will address and include additional attributes determined to be relevant by the vendor and the BA Engineering Subcommittee.

**Preliminary Schedule – Dates will be adjusted as necessary**

- 00/00/0000 – RFP advertising date.
- 00/00/0000 – Proposal submission deadline.
- 00/00/0000 – Vendor proposal to be chosen by BA.
- 00/00/0000 – Meetings with vendor and BA representatives as necessary.
- 00/00/0000 – Initial draft submitted to BA for input and review by Engineering Subcommittee /and BA staff.

- 00/00/0000 – Draft fine-tuning with BA staff and Engineering Subcommittee complete.
- 00/00/0000 – Final documents delivered to BA in pdf, spreadsheet and other formats to BA creative department. Exact formats of each text, graphic, and any other content will be mutually agreed upon by vendor and BA creative and web departments. BA creative and web departments will then convert documents into formats to be delivered to/published in a web-based home.

### **Process and Payments**

Process:

By the 15th of each month status updates will be provided by the vendor to the BA during development of the resources as outlined in the schedule above. Updates will be in the form of periodic project summaries, outside or in addition to ongoing correspondence between vendor and BA staff.

Payments will be made to vendor within two weeks of receipt of required documents being received by the BA. Final documents will be in a form mutually acceptable to vendor and BA staff, web and creative teams.

### **About the Brewers Association**

The Brewers Association is a 501(c)(6) not-for-profit trade association. The Brewers Association is an organization of brewers, for brewers and by brewers. More than 4,800 U.S. brewery members and 45,000 members of the American Homebrewers Association are joined by members of the allied trade, beer distributors, individuals, other associate members and the Brewers Association staff to make up the Brewers Association. The BA homepage can be found at <https://www.brewersassociation.org/>.

### **Purpose**

To promote and protect American craft brewers, their beer and the community of brewing enthusiasts.

### **Core Values & Beliefs**

- At the Brewers Association we believe in:
- Promoting and celebrating the small, independent, traditional and innovative culture of American craft brewers
- Vigorously defending our industry and providing craft brewers with a unified voice
- Fostering transparency within our own organization
- Supporting and encouraging the responsible enjoyment of beer
- Providing stewardship for 10,000 years of brewing history
- Educating brewers and consumers about the diversity, flavor and quality of beer
- Improving the economic health of American craft brewers
- Working to build a collegial community of brewers, homebrewers and brewing enthusiasts
- Promoting ethical and legal trade practices
- Building relationships and collaborating with our industry partners

**About the BA Technical Committee and the Engineering Subcommittee**

BA members include hundreds of start-up companies, which by definition are small, as well as established companies with years or decades of maturity. Members include brewpubs and taproom breweries as well as packaging breweries. The primary focus of the Technical committee is to support members in their businesses by creating best practices for the industry in the areas of draught quality, quality, safety, sustainability and other brewery operations. The mission of the Engineering Subcommittee is to function as a recognized resource for engineering knowledge and best practices within the craft brewing industry.

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