

City and County of San Francisco

Sourcing Event ID 000005806

Micro-LBE Set Aside Request for Proposals for Event Planning Services: TTX-FY21 K2C Event Planning

This Solicitation can be viewed under at City’s Supplier Portal and the Office of the Treasurer and Tax Collector’s website: <https://sfcitypartner.sfgov.org/pages/index.aspx> and <https://sftreasurer.org/about-us/request-proposals>.



Request for Proposals Issuance	August 23, 2021
Deadline for Questions	August 30, 2021, 5pm PST
Deadline to Submit Proposals	September 20, 2021, 5pm PST
Period for Protesting Notice of Intent to Award	Within (3) three business days of the City's issuance of a Notice of Intent to Award.
Contract Administrator:	Amanda Wentworth Contract Manager, TTX 1 Dr. Carlton B. Goodlett Pl., City Hall Room 140, San Francisco, CA 94102 Phone: (415) 554-4871 Email: Amanda.Wentworth@sfgov.org

Solicitation Attachments:

- Attachment 1: City’s Proposed Agreement Terms (P-600)
- Attachment 2: Price Proposal Template
- Attachment 3: Proposer Questionnaire and References
- Attachment 4: First Source Hiring Form
- Attachment 5: CMD Attachment 5: Requirements for Micro-LBE Set-Aside Architecture, Engineering, Professional Services Contracts
- Attachment 6: Health Care Accountability Ordinance & Minimum Compensation Ordinance Forms

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I. INTRODUCTION AND SOLICITATION SCHEDULE

A. Introduction

1. General

This Request for Proposals (hereinafter “Solicitation”) is being issued by the Office of the Treasurer and Tax Collector (“TTX”). TTX is seeking qualified suppliers (“Proposers”) to provide proposals for event planning services (Proposal). TTX shall order goods and/or services covered by the awarded contract through the issuance of individual Purchase Orders and/or Task Orders which shall be released against the awarded contract during the contract term.

2. Selection Overview

The City shall award a contract to the Proposer whose Proposal receives the highest-ranking score.

B. Anticipated Contract Term

A contract awarded pursuant to this Solicitation shall be non-exclusive with an original term of 1 year. The City at its sole, absolute discretion, shall have the option to extend the term for 1 additional year for a total of 2 years.

C. Anticipated Contract Not to Exceed Amount

A contract awarded pursuant to this Solicitation shall have a not to exceed (“NTE”) amount of \$100,000 for the initial term. Should the contract be extended, the NTE may proportionally increase as well.

D. Indefinite Quantity, As Needed Contract

A contract awarded pursuant to this Solicitation will result in a term, indefinite quantities, as-needed contract. There is no guarantee of a minimal amount of goods or services for any of the Proposers selected for contract negotiations or for the awarded Proposer(s). Unless otherwise specified herein, deliveries and services will be required in quantities and at times as ordered during the period of the contract. Estimated quantities, if any, stated in this Solicitation are approximations only. City, in its sole discretion, may purchase any greater or lesser quantity. City may also make purchases of items awarded pursuant to this Solicitation from other suppliers when City determines, in its sole discretion, that it is in the best interest of the City to do so.

E. Cooperative Agreement

Any other City department, public entity and non-profit made up of multiple public entities, may use this solicitation to obtain some or all of the commodities or services to be provided by Proposer under the same terms and conditions of any contract awarded pursuant to this Solicitation.

F. Limitation on Communications During Solicitation

From the date this Solicitation is issued until the date the competitive process of this Solicitation is completed (either by cancelation or final Award), Proposers and their subcontractors, vendors, representatives and/or other parties under Proposer’s control, shall communicate solely with the Contract Administrator whose name appears in this Solicitation. Any attempt to communicate with any party other than the Contract Administrator whose name appears in this Solicitation – including any City official, representative or employee - is strictly prohibited. Failure to comply with this communications protocol may, at the sole discretion of City, result in the disqualification of the Proposer or potential Proposer from the competitive process. This protocol does not apply to communications with the City regarding business not related to this Solicitation.

G. Solicitation Schedule

The anticipated schedule for this Solicitation is set forth below. These dates are tentative and subject to change. It is the responsibility of the Proposer to check for any Addenda to this Solicitation or other pertinent information posted in the City's Supplier Portal and the TTX website: <https://sfcitypartner.sfgov.org/pages/index.aspx> and <https://sftreasurer.org/about-us/request-proposals>.

Proposal Phase	Tentative Date
Request for Proposals Issued	August 23, 2021
Deadline for Written Questions	August 30, 2021, 5pm PST
Deadline to Submit Proposals	September 20, 2021, 5pm PST
Period for Protesting Notice of Intent to Award	Within (3) three business days of the City's issuance of a Notice of Intent to Award.

H. How to Register as a City Supplier

The following requirements pertain only to Proposers not currently registered with the City as a Supplier.

Step 1: Register as a BIDDER at City's Supplier Portal:

<https://sfcitypartner.sfgov.org/pages/index.aspx>

Step 2: Follow instructions for converting your BIDDER ID to a SUPPLIER ID. This will require you to register with the City Tax Collector's Office and submit Chapter 12B and 12C forms through the Supplier portal. Once these forms have been completed, submitted, and processed, you will be notified via email with your organization's new Supplier ID. That email will also provide instructions for completing your Supplier registration.

- **City Business Tax Registration Inquiries:** For questions regarding business tax registration procedures and requirements, contact the Tax Collector's Office at (415) 554-4400 or, if calling from within the City and County of San Francisco, 311.
- **Chapter 12(B) and 12(C) Inquiries:** For questions concerning the City's Chapter 12(B) and 12(C) Equal Benefits and Non-Discrimination in Contracting requirements, go to: www.sfgov.org/cmd.

I. Proposal Questions and Submissions

1. Proposer Questions and Requests for Clarification

Proposers shall address any questions regarding this Solicitation to the Contract Administrator whose name and contact information appears on the cover page of this Solicitation. Proposers who fail to submit questions concerning this Solicitation and its requirements will waive all further rights to protest based on the specifications and conditions herein. **Questions must be submitted by email to the Contract Administrator whose name and contact information appears on the cover page of this Solicitation no later than the deadline for submission of written questions or requests for clarification.** A written Addendum will be executed addressing each question and answer and posted publicly. It is the responsibility of the Proposer to check for any Addenda and other updates that will be posted on the City's Supplier Portal <https://sfcitypartner.sfgov.org/pages/Events-BS3/event-search.aspx> and the TTX website <https://sftreasurer.org/about-us/request-proposals>.

2. Proposal Format

Proposals must be created using a word processing software (e.g. Microsoft Word or Excel) and typed in a serif font (e.g.-Times New Roman). The document must have page margins of at least .5” on all sides. Information must be provided at a level of detail that enables effective evaluation and comparison between Proposals. Failure to follow formatting, submission, or content requirements, as well as page limit restrictions (if any), may negatively impact the evaluation of your Proposal.

3. Time and Place for Submission of Proposals

Prior to the Proposal submission deadline, Proposers must email their complete Proposals to the Contract Administrator whose name and contact information appears on the cover page of this Solicitation. Late submissions will not be considered. Each original Proposal received will be screened to ensure that all content required by this Solicitation is included. Partial or complete omission of any required content may disqualify Proposals from further consideration. Late Proposal submissions will not be considered and failure to adhere to the above requirements may result in the complete rejection of your Proposal.

J. Proposal Selection

The acceptance and/or selection of any Proposal(s) shall not imply acceptance by the City of all terms of the Proposal(s), which may be subject to further approvals before the City may be legally bound thereby.

K. Contract Terms and Negotiations

The successful Proposer will be required to enter into the Agreement attached hereto as Attachment 1, City’s Proposed Agreement Terms. The Proposed Agreement Terms are not subject to negotiation. Failure to timely execute the Proposed Agreement, or to furnish any and all insurance certificates and policy endorsement, surety bonds or other materials required in the Proposed Agreement, shall be deemed an abandonment of the Proposal and City, in its sole discretion, may select another Proposer and proceed against the original selectee for damages.

L. Protest Procedures

1. Protest of Non-Responsiveness Determination

Within (3) three business days of the City's issuance of a Notice of Non-Responsiveness, a Proposer may submit a written Notice of Protest of Non-Responsibility. The Notice of Protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The Notice of Protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or Solicitation provision on which the protest is based. In addition, the Notice of Protest must specify facts and evidence sufficient for the City to determine the validity of the protest.

2. Protest of Non-Responsible Determination

Within (3) three business days of the City's issuance of a Notice of Non-Responsibility, a Proposer may submit a written Notice of Protest of Non-Responsibility. The Notice of Protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The Notice of Protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or Solicitation provision on which the protest is based. In addition, the Notice of Protest must specify facts and evidence sufficient for the City to determine the validity of the protest.

3. Protest of Contract Award

Within (3) three business days of the City's issuance of a Notice of Intent to Award, a Proposer may submit a written Notice of Protest of Contract Award. The Notice of Protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The Notice of Protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or Solicitation provision on which the protest is based. In addition, the Notice of Protest must specify facts and evidence sufficient for the City to determine the validity of the protest.

4. Delivery of Protests

A Notice of Protest must be written. Protests made orally (e.g., by telephone) will not be considered. A Notice of Protest must be delivered by mail or email to the Contract Administrator whose name and contact information appears on the cover page to this Solicitation and received by the due dates stated above. A Notice of Protest shall be transmitted by a means that will objectively establish the date the City received the Notice of Protest. If a Notice of Protest is mailed, the protestor bears the risk of non-delivery within the deadlines specified herein.

II. CITY'S SOCIAL POLICY REQUIREMENTS

The San Francisco Municipal Code establishes a number of requirements for people seeking to do business with the City ("Social Policy Requirements"). These Social Policy Requirements can be found in Attachment 1, City's Proposed Agreement Terms. The Social Policy Requirements set forth below are NOT intended to be a complete list of all Social Policy Requirements applicable to this Solicitation and any contracts awarded from it. Proposers are encouraged to carefully review the Social Policy Requirements applicable to this Solicitation contained in Attachment 1, City's Proposed Agreement Terms.

A. Proposers Unable to do Business with the City

1. Generally

Proposers that do not comply with laws set forth in San Francisco's Municipal Codes may be unable to enter into a contract with the City. Laws applicable to this Solicitation are set forth below and in Attachment 1, City's Proposed Agreement Terms.

2. Administrative Code Chapter 12X

Subject to certain exceptions, Proposers are advised that this Solicitation is subject to the requirements of Administrative Code Chapter 12X, which prohibits the City from entering into a contract with a Proposer that (a) has its headquarters in a state that has enacted a law that perpetuates discrimination against LGBT people and/or has enacted a law that prohibits abortion prior to the viability of the fetus, or (b) will perform any or all of the work on the contract in such a state. Chapter 12X requires the City Administrator to maintain a list of such states, defined as "Covered States" under Administrative Code Sections 12X.2 and 12X.12. The list of Covered States is available on the website of the City Administrator (<https://sfgsa.org/chapter-12x-state-ban-list>). Proposers will be required to certify compliance with Chapter 12X as part of its Proposal, unless the City determines that a statutory exception applies. *Refer to Attachment 1, City Proposed Agreement Terms for additional details related to the application of this Ordinance to a contract awarded pursuant to this Solicitation.*

3. Administrative Code Chapter 12B

A Proposer selected pursuant to this Solicitation may not, during the term of the Agreement, in any of its operations in San Francisco, on real property owned by San Francisco, or where work is being performed for the City elsewhere in the United States, discriminate in the

provision of bereavement leave, family medical leave, health benefits, membership or membership discounts, moving expenses, pension and retirement benefits or travel benefits, as well as any benefits other than the benefits specified above, between employees with domestic partners and employees with spouses, and/or between the domestic partners and spouses of such employees, where the domestic partnership has been registered with a governmental entity pursuant to state or local law authorizing such registration, subject to the conditions set forth in §12B.2(b) of the San Francisco Administrative Code. *Refer to Attachment 1, City Proposed Agreement Terms for additional details related to the application of this Ordinance to a contract awarded pursuant to this Solicitation.*

B. Reserved. (Prevailing Wage Ordinance)

C. Health Care Accountability Ordinance

A Proposer selected pursuant to this Solicitation shall comply with the requirements of Chapter 12Q. For each Covered Employee, an awarded Proposer shall provide the appropriate health benefit set forth in Section 12Q.3 of the Health Care Accountability Ordinance (HCAO). If a Proposer selected pursuant to this Solicitation chooses to offer the health plan option, such health plan shall meet the minimum standards set forth by the San Francisco Health Commission. Information about and the text of the Chapter 12Q and the Health Commission’s minimum standards available at <http://sfgov.org/olse/hcao>. Any Subcontract entered into by Proposer shall also be required to comply with the requirements of the HCAO and shall contain contractual obligations substantially the same as those set forth in this section. *Refer to Attachment 1, City Proposed Agreement Terms for additional details related to the application of this Ordinance to a contract awarded pursuant to this Solicitation.*

D. Minimum Compensation Ordinance

A Proposer selected pursuant to this Solicitation shall comply with Administrative Code Chapter 12P. A Proposer selected pursuant to this Solicitation shall pay covered employees no less than the minimum compensation required by San Francisco Administrative Code Chapter 12P, including a minimum hourly gross compensation, compensated time off, and uncompensated time off. A Proposer selected pursuant to this Solicitation is subject to the enforcement and penalty provisions in Chapter 12P. Information about and the text of the Chapter 12P is available on the web at <http://sfgov.org/olse/mco>. *Refer to Attachment 1, City Proposed Agreement Terms for additional details related to the application of this Ordinance to a contract awarded pursuant to this Solicitation.*

E. First Source Hiring Program

A Proposer selected pursuant to this Solicitation shall comply with all of the provisions of the First Source Hiring Program, Chapter 83 of the San Francisco Administrative Code that apply to this Agreement and an awarded Proposer is subject to the enforcement and penalty provisions in Chapter 83. *Refer to Attachment 1, City Proposed Agreement Terms for additional details related to the application of this Ordinance to a contract awarded pursuant to this Solicitation.*

F. Micro-LBE Set-Aside Program

Contracts resulting from this Solicitation will be administered pursuant to the City and County of San Francisco’s Micro-LBE Set-Aside Program.

Only Contract Monitoring Division (“CMD”) certified Micro-LBE contractors, as of the bid due date, certified to perform the scope of work in this Solicitation, are eligible to bid on this Set-Aside Contract in accordance with San Francisco Administrative Code Chapter 14B.

Bid discounts and LBE Subcontracting goals are not applicable to this contract. All other requirements of the Local Business Enterprise and Non Discrimination in Contracting Ordinance set forth in Chapter 14B of the San Francisco Administrative Code as it now exists or as it may be amended in the future (collectively the “LBE Ordinance”) shall apply to this contract proposal.

For further information, please go to <http://sfgov.org/cmd/> and review the requirements for Micro-LBE Set-Aside Architecture, Engineering, Professional Service Contracts and General Service Contracts, Attachment 5 available at:

<https://sfgov.org/cmd/sites/default/files/Documents/CMD%20Attachment%205%20-%208.01.16.pdf>.

All response packages must include the following forms located in CMD Attachment 5 *Requirements for Micro-LBE Set-Aside Architecture, Engineering, Professional Services Contracts*:

1. **Form 2A: CMD Contractor Participation Form**
2. **Form 3: CMD Compliance Affidavit**
3. **Form 5: CMD Employment Form**

If you have any questions regarding the Micro-LBE Set-Aside Program or need assistance with CMD Forms, you may contact Dalmar Ismail, the CMD Contract Compliance Officer for this Solicitation, at dalmar.ismail@sfgov.org.

G. Reserved. (Sweat Free Procurement)

H. Other Social Policy Provisions

Attachment 1, City’s Proposed Agreement Terms, identifies the City’s applicable social policy provisions related to a contract awarded pursuant to this Solicitation. Proposers are encouraged to carefully review these terms and ensure they are able to comply with them.

III. SERVICES REQUESTED

A. Services Requested

This Solicitation is being issued by TTX. TTX is seeking qualified suppliers (“Proposers”) to provide event planning services. The services being procured through this Solicitation are set forth below:

BACKGROUND

Introduction: The San Francisco Office of Financial Empowerment (OFE) housed within the Office of the Treasurer & Tax Collector (TTX) run innovative initiatives like Kindergarten to College (K2C) program. K2C is the oldest and largest municipally-led child savings account program in the country. It automatically opens a college savings account for every San Francisco Unified School District student (up to 11th grade) and incentivizes families to save for college. Currently, K2C maintains 45,000 active accounts with \$8M saved and as the first cohort enters 11th grade.

In recognition of the program's ten-year anniversary, K2C will convene policy makers, community members, students and families in a commemorative event held at City Hall. The primary purpose of this celebration is to increase awareness of K2C, uplift the program's successes, share exciting new developments (e.g. the opportunity to link to California's 529 Scholarshare while earning local saving and engagement related incentives), and build overall support for universal child saving account initiatives. This in-person event will be held in spring 2022 and will host 75-100 with a virtual component where hundreds more can join online. The event will feature in-person speakers alongside recorded testimonials from public officials, stakeholders and participants as well as activities such as a tour of the vault at City Hall and opportunity to make deposits at the cashier's office. K2C is also open to suggestions for smaller neighborhood focused events and other engagement opportunities to maintain the spirit of the celebration throughout the school year. With excitement at the state and federal level around college savings and cash transfers, now is the perfect opportunity to highlight the work of K2C as a vehicle to close the opportunity gap, by ensuring every SFUSD student has a savings vehicle and feels San Francisco's full commitment of turning their dreams of going to college into reality.

SCOPE OF WORK

Objective: The overall objective of this solicitation is to receive assistance designing and implementing the ten-year anniversary celebration for Kindergarten to College (K2C), including a large in-person event at City-Hall alongside recommendations for activities to maintain engagement throughout the school year.

Details: The consultant will be responsible for event planning including the following tasks:

- Design the overall ten-year celebration based on financial, time and space limitations and project manage the preparation leading up to the ten-year event, including:
 - Understand event objectives and constraints and structure event to meet goals
 - Engage with key OFE, TTX and K2C staff to solicit input and confirm key decisions
 - Provide feedback on event program and ideas for improvement
 - Create a project timeline with specific milestones and share regular progress updates with metrics and status updates, including reports (e.g. registration, spending) and suggestions to pivot as needed to accomplish goals
 - Collaborate with K2C and any contracted communications firm of OFE to ensure brand alignment and consistency of overall messaging in collateral, website or other visuals (e.g., letter head, social media, banners) for ten year celebration
 - Draft, publish, send and support responses to key communications for celebration, including written and email invitations for speaker and stakeholders media press releases, event registration confirmation, print and digital invitations for K2C participants (e.g. post card, SMS, email blasts, social media) to attend in-person or virtually
 - Liaison with City Hall Building Operation and outside vendors such as caterers to solidify details for event space, including set-up and break down
 - Design overall event script for event emcee(s) and prep if needed confirmed speakers with any needed talking points
 - Secure any pre-recorded videos by select individuals unable to participate in person if needed

- Contract if needed to ensure professional photography during event, as well as coordinate with SF GOV TV for videography, ensuring pre-signed releases
- Develop and finalize event schedule for internal use that clearly sets expectations for who is doing what and when, with sufficient timing and transitions for event flow
- Coordinate arrival details, including public transit and parking information, checking in with security, and special accommodations for disabilities with appropriate parties
- Provide a platform for live streaming and contract as needed for real-time interpretation in Spanish and Cantonese and closed captioning during the live event via K2C and OFE related social media platforms or channels (e.g. Facebook, Youtube, Twitter)
- Recommend and order any supplies, including any printed program of the ten-year anniversary or giveaways branded with K2C
- Support coordination with TTX Office and K2C team for in-person deposits by students at City Hall cashier's office
- Design and implement other related events or campaigns to build excitement around in-person ten-year celebration
- Manage and staff pre and day of logistics for main event at City Hall including online streaming and engagement of celebration for those joining virtually:
 - Support in person activities, including a deposit day, games or giveaways for engaging participants
 - Provide, secure and coordinate audio/AV including, microphones, projection and screens, cameras for live streaming
 - Set-up stage for speakers with podium and any key transitions including round table like discussions
 - Prepare and potentially host or provide clear instructions for monitoring the live streaming the event onto K2C and OFE related social media platforms and channels (e.g. Facebook, Youtube, Twitter)
 - Staff guest check in and preparation with VIPs and key audiences (speakers, media, elected officials)
 - Provide or coordinate event set-up, staffing and break-down as needed
 - Coordinate photographer and videographer in person to ensure marketable images and video are captured
- Support follow-up to main event and support for any smaller scale community events or engagement throughout the school year:
 - Send after event communication to attendees, including thank you to speakers and email recap with highlights
 - Finalize any payments to vendors and ensuring receipt of any final deliverables e.g., high-quality edited images
 - Possibly creating a site or curate images, video clips and quotes to share via social media that build engagement and momentum for K2C beyond the ten-year celebration as a one-time event
 - Facilitate a discussion of the celebration with key takeaways with OFE stakeholders that includes reflections and documents recommendations for future events

Timeline: The ten-year celebration for Kindergarten to College (K2C) has a tight timeline. Planning and communication can begin as early as the start of the new SFUSD school (August/September) and the main event will take place in early spring with the potential for smaller events earlier in fall semester or later on in the spring. The consultant contracted for event planning

must also be available for support after the main event to assist with follow-up tasks and communication and continue engagement through the school year which ends in late May.

B. Green Purchasing Requirements

In preparation for any Proposal submitted in response to this Solicitation, Proposers are required to review the City [Mandatory Green Purchasing Requirements](#) to ensure all goods and services offered to City in response to this Solicitation comply with the City’s Green Purchasing Requirements. In addition, Proposers are encouraged to refer to Attachment 1, City’s Proposed Agreement Terms, for additional details related to the Green Purchasing Requirements applicable to any contract awarded pursuant to this Solicitation.

IV. PROPOSAL EVALUATION CRITERIA

Evaluation Phase	Maximum Points
Minimum Qualifications Documentation	Pass/Fail
Price Proposal	10 Points
Written Proposal	90 Points
TOTAL POINTS (per Evaluator)	100

Responsive Proposals will be evaluated by a panel (“Evaluation Panel”) consisting of one or more parties with expertise related to the services being procured through this Solicitation. The Evaluation Panel may include staff from various City departments. Proposals will be evaluated based on the criteria outlined in the table above, each of which is addressed in more detail herein. Each Evaluation Panel member will score proposals out of a maximum 100 points and the totals will be added together for a final score. Proposers will be ranked starting with the Proposer receiving the highest score, then continuing with the Proposer receiving the second highest score, and so on. Award shall be made to the Proposer with the highest Total Points.

V. REQUIRED SUPPORTING DOCUMENTATION

Proposers must provide each Required Supporting Documentation (“RSD”) identified below with their Proposal. Failure to do so may result in the Proposal being deemed Non Responsive.

RSD1	Evidence that Proposer is 12B compliant or likely to become compliant within 30 days.
RSD2	<p>Completed Proposal Attachments:</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> San Francisco Business Tax Certificate or evidence of exemption <input checked="" type="checkbox"/> Signed copy of all Proposal Addenda (If applicable) <input type="checkbox"/> Attachment 1: Reserved. (City’s Proposed Agreement Terms) <input checked="" type="checkbox"/> Attachment 2: Price Proposal Template <input checked="" type="checkbox"/> Attachment 3: Proposer Questionnaire and References <input checked="" type="checkbox"/> Attachment 4: First Source Hiring Form <input checked="" type="checkbox"/> Attachment 5: CMD Attachment 5: Requirements for Micro-LBE Set-Aside Architecture, Engineering, Professional Services Contracts <input checked="" type="checkbox"/> Attachment 6: Health Care Accountability Ordinance & Minimum Compensation Ordinance Forms
RSD3	<p>Non Profit Entities: If a Proposer is a non-profit entity that receives a cumulative total per year of at least \$250,000 in City funds or City-administered funds and is a non-profit organization as defined in Chapter 12L of the S.F. Administrative Code, the Proposer must comply with Chapter 12L and include in its Proposal:</p> <p>(1) a statement describing its efforts to comply with the Chapter 12L provisions regarding public access to Proposer’s meetings and records, and</p>

	<p>(2) a summary and disposition of all complaints concerning the Proposer’s compliance with Chapter 12L that were filed with the City in the last two years and deemed by the City to be substantiated. If no such complaints were filed, the Proposer shall include a statement to that effect.</p> <p><i>Failure to comply with the reporting requirements of Chapter 12L or material misrepresentation in Proposer’s Chapter 12L submissions shall be grounds for rejection of the Proposal and/or termination of any subsequent Agreement reached on the basis of the Proposal.</i></p>
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VI. MINIMUM QUALIFICATIONS DOCUMENTATION (PASS/FAIL)

Proposers must provide documentation that clearly demonstrates each Minimum Qualification (MQ) listed below has been met. Minimum Qualification documentation should be clearly marked as “MQ1”, MQ2”, etc.... to indicate which MQ it supports. Each Proposal will be reviewed for initial determination on whether Proposer meets the MQs referenced in this section. **This screening is a pass or fail determination and a Proposal that fails to meet the Minimum Qualifications will not be eligible for further consideration in the evaluation process.** The City reserves the right to request clarifications from Proposers prior to rejecting a Proposal for failure to meet the Minimum Qualifications.

MQ #	Description
MQ1	Evidence that Proposer has 3 years of experience within the last 5 years in the sale of goods and/or services requested by this Solicitation.
MQ2	Proposer is able to provide 2 references for former clients.
MQ3	Proposer must have coordinated an event for a public or nonprofit sector client within the past five years.

VII. PRICE PROPOSAL (10 Points)

A. Price Proposal Format

The Price Proposal Template associated with this Solicitation is attached hereto as Attachment 2. Include a completed Price Proposal Template with your Proposal, following all instructions set forth therein. The total points allocated (which will not consider **Other Direct Costs**) shall be determined as follows:

$(\text{Lowest Proposer's Average Hourly Rate} / \text{Proposer's Average Hourly Rate}) \times (\text{Maximum Points possible for Price (10pts)})$.

Please be sure to include costs for items that may need to be sub-contracted under the section **Other Direct Costs** of Attachment 2 (for example, collateral, photography, videography, etc.).

VIII. WRITTEN PROPOSAL (90 POINTS)

In addition to submitting documents supporting each Minimum Qualification as required by this Solicitation, Proposers shall also submit a complete Proposal consisting of each item set forth below. *The content of all Proposals must consist of the information specified below, in the order outlined below, in order to be deemed responsive.* In total, the proposal, including narrative and visuals should not exceed 10 pages and should be provided in a PDF file format.

A. Project Plan (55 Points)

Provide a brief description of the Proposer’s size and organization structure, including:

- Detailed proposed plan that demonstrates understanding of the event, tasks, activities as detailed in the Scope of work and provide a vision for K2C anniversary event and any events leading up **(20pts)**
- Timeline for activities, key deliverables and milestones for the project with rationales behind timing **(20pts)**
- Clear expectation for client involvement and delineation of tasks that fall to client and other stakeholders as well as plan and cadence for communication **(10pts)**
- Proposer’s capacity and resources to meet demands **(5 pts)**

B. Firm and Staff Qualifications (35 Points)

- Proposer’s background and experience providing services comparable to those in this RFP, including planning events of similar size and scope **(20 pts)**
- Proposer’s experience providing events for public or non-profit sector, aimed at similar audience or addressing similar topics, such as education, financial empowerment, program aimed at children and as well as cultural competencies designing programming for San Francisco’s diverse communities, in particular low-income families of color **(10 pts)**
- Qualifications and educational and professional backgrounds of lead staff member(s) **(5 pts)**

IX. RESERVED. (ORAL INTERVIEWS)

X. INSURANCE AND BONDS

A. Insurance

Prior to award, the successful Proposer(s) will be required to furnish evidence of insurance as outlined in Attachment 1, City’s Proposed Agreement Terms.

B. Reserved. (Performance Bond)

C. Reserved. (Fidelity Bond)

D. Failure to Provide Insurance and/or Bonds

Unless otherwise stated, within ten business days of the receipt of a notice of award, the Proposer to whom the contract is awarded shall deliver the required bond documents and/or specified insurance certificates to City. If the Proposer fails or refuses to furnish the required bond and/or insurance within ten days after receiving notice from Purchasing, Purchasing may, at its option, determine that this Proposer has abandoned its Proposal. Thereupon the tentative award of said contract to this Proposer shall be canceled and City shall notify the Proposer’s surety and collect on the Proposer’s bond (or the check accompanying its Proposal shall be deposited with the Treasurer of the City and County of San Francisco for collection) and the proceeds thereof shall be retained by City as partial liquidated damages for failure of such Proposer to properly file the bonds and insurance herein required. The foregoing in no way limits the damages which are recoverable by City whether or not defined elsewhere in the contract documents.

XI. TERMS AND CONDITIONS FOR RECEIPT OF PROPOSALS

A. Solicitation Errors and Omissions

Proposers are responsible for reviewing all portions of this Solicitation. Proposers are to promptly notify the City, in writing and to the Solicitation contact person if the Proposer discovers any ambiguity, discrepancy, omission, or other error in the Solicitation. Any such notification should be directed to the City promptly after discovery, but in no event later than the deadline for questions. Modifications and clarifications will be made by Addenda as provided below.

B. Objections to Solicitation Terms

Should a Proposer object on any ground to any provision or legal requirement set forth in this Solicitation, the Proposer must, no later than the deadline for questions, provide written notice to the setting forth with specificity the grounds for the objection. The failure of a Proposer to object in the manner set forth in this paragraph shall constitute a complete and irrevocable waiver of any such objection.

C. Solicitation Addenda

The City may modify this Solicitation, prior to the Proposal due date, by issuing an Addendum to the Solicitation, which will be posted on the San Francisco Supplier Portal and the TTX website. Every Addendum will create a new version of the Sourcing Event and Proposers must monitor the event for new versions. **The Proposer shall be responsible for ensuring that its Proposal reflects any and all Solicitation Addenda issued by the City prior to the Proposal due date regardless of when the Proposal is submitted.** Therefore, the City recommends that the Proposer consult the website frequently, including shortly before the Proposal due date, to determine if the Proposer has downloaded all Solicitation Addenda. It is the responsibility of the Proposer to check for any Addenda, Questions and Answers documents, and updates, which may be posted to the subject Solicitation.

D. Proposal Term

Submission of a Proposal signifies that the proposed products, services and prices are valid for 180 calendar days from the Proposal due date and that the quoted prices are genuine and not the result of collusion or any other anti-competitive activity. At Proposer's election, the Proposal may remain valid beyond the 180-day period in the circumstance of extended negotiations.

E. Revision to Proposal

A Proposer may revise a Proposal on the Proposer's own initiative at any time before the deadline for submission of Proposals. The Proposer must submit the revised Proposal in the same manner as the original. A revised Proposal must be received on or before, but no later than the Proposal due date and time. In no case will a statement of intent to submit a revised Proposal, or commencement of a revision process, extend the Proposal deadline for any Proposer. At any time during the Proposal evaluation process, the City may require a Proposer to provide oral or written clarification of its Proposal. The City reserves the right to make an award without further clarifications of Proposals received.

F. Proposal Errors and Omissions

Failure by the City to object to an error, omission, or deviation in the Proposal will in no way modify the Solicitation or excuse the Proposer from full compliance with the specifications of this Solicitation or any contract awarded pursuant to this Solicitation.

G. Financial Responsibility

The City accepts no financial responsibility for any costs incurred by a Proposer in responding to this Solicitation. Proposers acknowledge and agree that their submissions in response to this Solicitation will become the property of the City and may be used by the City in any way deemed appropriate.

H. Proposer's Obligations under the Campaign Reform Ordinance

Proposers must comply with Section 1.126 of the S.F. Campaign and Governmental Conduct Code. Local law prohibits City elected officials from soliciting or accepting contributions from any person or entity seeking to enter into a contract or grant worth \$100,000 or more with the City, if the contract or grant requires their approval or the approval of their appointees to the board of a state agency. This restriction applies to the party seeking the contract or grant, the party's board of directors, chairperson, chief executive officer, chief financial officer, chief operating officer, any person with an ownership interest greater than ten percent, and any political committees controlled or sponsored by the party, as well as any subcontractors listed in the awarded contract or Proposal. The law both prohibits the donor from giving contributions and prohibits the elected official from soliciting or accepting them.

A person or entity that contracts with the City may not make a campaign contribution to an elected official if the contract would require approval by that official, a board on which the official serves, or a board of a state agency on which an appointee of the official sits. The people and entities listed in the preceding paragraph may not make a campaign contribution to the elected official at any time from the submission of a Proposal for a contract until either: (1) negotiations are terminated and no contract is awarded or no grant is approved; or (2) twelve months have elapsed since the award of the contract or approval of the grant.

A violation of Section 1.126 may result in the criminal, civil, or administrative penalties. For further information, Proposers should contact the San Francisco Ethics Commission at [\(415\) 252-3100](tel:415-252-3100).

I. Reservations of Rights by the City

The issuance of this Solicitation does not constitute a guarantee by the City that a contract will be awarded or executed by the City. The City expressly reserves the right at any time to:

1. Waive or correct any defect or informality in any response, Proposal, or Proposal procedure;
2. Reject any or all Proposals;
3. Reissue the Solicitation;
4. Prior to submission deadline for Proposals, modify all or any portion of the selection procedures, including deadlines for accepting responses, the specifications or requirements for any materials, equipment or services to be provided under this Solicitation, or the requirements for contents or format of the Proposals;
5. Procure any materials, equipment or services specified in this Solicitation by any other means; or
6. Determine that the subject goods or services are no longer necessary.

J. No Waiver

No waiver by the City of any provision of this Solicitation shall be implied from the City's failure to recognize or take action on account of a Proposer's failure to comply with this Solicitation.

K. Other

1. The City may make such investigation, as it deems necessary, prior to the award of this contract to determine the conditions under which the goods are to be delivered or the work is to be performed. Factors considered by the City shall include, but not be limited to:

- a. Any condition set forth in this Solicitation;
- b. Adequacy of Proposer's plant facilities and/or equipment, location and personnel location to properly perform all services called for under the Purchase Order; and
- c. Delivery time(s).

2. City reserves the right to inspect an awarded Proposer's place of business prior award of and/or at any time during the contract term (or any extension thereof) to aid City in determining an awarded Proposer's capabilities and qualifications.

3. Failure to timely execute a contract, or to furnish any and all insurance certificates and policy endorsements, surety bonds or other materials required in the contract, shall be deemed an abandonment of a contract offer. The City, in its sole discretion, may select another Proposer and may proceed against the original selectee for damages.

4. City reserves the right to reject any Proposal on which the information submitted by Proposer fails to satisfy City and/or if Proposer is unable to supply the information and documentation required by this Solicitation within the period of time requested.

5. Any false statements made by a Proposer or any related communication/clarification may result in the disqualification of its Proposal from receiving further evaluation and a contract award.