THE CITY UNIVERSITY OF NEW YORK

REQUEST FOR PROPOSALS

UCO 626

EVENT PLANNING AND MANAGEMENT CONSULTANT SERVICES

Proposal Due Date: **April 22, 2016 at 12:00 pm Eastern Standard Time**

Proposal Delivery Location and
Additional Information:

Office of the University Controller
230 West 41st Street, 5th Floor
New York, NY 10036
Attn: Ayla Bakkalli

UCO 626-Event Planning and Management Consultant Services

Overview

The City University of New York ("CUNY" or the "University") and the City University Construction Fund ("CUCF") are seeking a well-qualified, highly motivated and innovative event planning firm ("Consultant") to provide event planning and management consultant services ("Services") in connection with the City University of New York and the City University Construction Fund ("CUCF") supplier diversity conference ("Event") that highlights contracting opportunities to New York State ("NYS") certified Minority and Women-owned Business Enterprises and NYS-certified Service-Disabled Veteran Owned Businesses. Services for the Event shall include, but not be limited to planning, production, coordination, marketing and presentation of the Event.

CUNY anticipates making one award to an event planning firm pursuant to this RFP (if any, the "Consultant") as a result of this Request for Proposal ("RFP") and issuing a single contract, as described in greater detail below. CUNY anticipates issuing a blanket Purchase Order not to exceed **$50,000.00. The selected Consultant, if any, will be required to execute an Independent Contractor Agreement in form and substance acceptable to CUNY, and substantially in the form attached hereto as Attachment B (the "Contract"), which will govern the Services.**

CUNY requests responses to this RFP from potential vendors ("Proposers") in the form of written proposals, as are described in greater detail below ("Proposals"). Responses to this RFP are due April 22, 2016 by 5:00PM after the advertisement publication due date. Proposers must submit their response to the following proposal delivery location:

Office of the University Controller
230 West 41st, Street, 5th Floor
New York, NY 10036
Attn.: Ayla Bakkalli
UCO 626-Event Planning and Management Consultant Services

Your technical and cost proposal must be separately sealed and clearly labeled on the outside with the following:

UCO# 626 Event Planning and Management Consultant Services

All questions concerning this solicitation must be directed to the Designated Contact, Ayla Bakkalli at (212) 397-5649 or via email at ayla.bakkalli@cuny.edu

Proposers are reminded that from the date this RFP is issued until a Contract is signed: no contact is permitted regarding this solicitation with any CUNY or CUCF staff except with the designated contact named above. Any unauthorized contact by Proposer may result in the rejection of its Proposal, in addition to other possible sanctions under the procurement Lobbying Act. By submitting a Proposal, a vendor affirms that they understand and agree to comply with the

procedures of CUNY relative to permissible Contacts as required by State Finance Law §§139-j and 139-k, particularly §139-j (3) and §139-j (6) (b).

Schedule of Key Events

CUNY will attempt to adhere to the following schedule with regard to this solicitation:

Date	Event
March 31, 2016	RFP Release Date
April 11, 2016	Questions Due Date and Time - for receipt of vendor questions
April 22, 2016	Proposal Submission Due Date and Time

1. Introduction

1.1 General

CUNY and CUCF seek to create and execute a premier Event that will connect NYS-certified Minority- and/or Women-owned Business Enterprises (collectively, "MWBEs") and NYS-certified Service-Disabled Veteran Owned Businesses ("SDVOBs"), and those who aspire to be NYS-certified, to procurement opportunities at CUNY and CUCF. The Consultant will be expected to provide exceptional support for the coordination of the Event itself while offering new and innovative ideas to the CUNY and CUCF that can improve the quality and effectiveness of the Event.

The goal of this Event is to create a seamless networking experience for NYS-certified MWBE and SDVOB firms and encourage the potential business opportunities at CUNY and CUCF to NYS-certified MWBEs and SDVOBs.

1.2 CUNY Overview:

The City University of New York provides high-quality, accessible education for more than 269,000 degree-credit students and 247,000 adult, continuing and professional education students at 24 campuses across New York City.

The University is an integrated system of senior and community colleges, graduate and professional schools, research centers, institutes and consortia. From certificate courses to Ph.D. programs, CUNY offers postsecondary learning to students of all backgrounds. It provides the City with graduates trained for high-demand positions in the sciences, technology, mathematics, teaching, nursing and other fields. As CUNY has grown, the University also has strengthened its

mission as a premier research institution, building an array of modern facilities and expanding the ranks of its world-class faculty.

1.3 CUCF Overview

CUCF central administers CUNY's capital construction and design program and is responsible for more than 300 buildings across twenty-four colleges and professional schools. CUCF is a public benefit corporation established by New York State to provide facilities for the City University of New York and support the educational purposes of CUNY. Contracting opportunities for CUCF exist through CUNY's Office of Facilities Planning, Construction and Management (FPCM). CUCF advances design, construction and development projects for new facilities and ongoing renovation of over 300 existing structures.

CUCF's contract opportunities at all levels (prime contracting, sub-contracting and sub-subcontracting and suppliers) are or will be available for specific projects and for task order requirements contracts for multiple projects in the following principal areas: architectural design services, engineering design services, construction management/build services, general contractors, trades contractors and property development services.

1.4 Minimum Qualifications:

To be considered eligible to submit a proposal in response to this RFP, Proposers must meet the following minimum qualification:

a. Proposers must have a minimum of three (3) years of previous experience providing services of similar scope and scale as those identified in this solicitation.

Proposals that fail to meet this requirement will be found non-responsive and rejected.

1.5 Term of the Contract

It is anticipated that the term of the contract awarded from this RFP will be approximately one (1) year commencing upon the Consultant's receipt of a written notice to proceed from the University. CUNY reserves the right, prior to contract award, to determine the length of the initial contract term with an option to renew under the same terms and conditions for an additional year at the sole discretion of CUNY.

In addition to any other termination or cancellation rights reserved by CUNY in the Contract, CUNY shall have the right to suspend, abandon or terminate the Contract without cause as a termination for convenience. In such case CUNY shall make a pro rata settlement with the Consultant based upon the Services performed to the satisfaction of CUNY up to the date of such suspension, abandonment or termination, as verified by audit.

In the event that Contract is suspended, abandoned or terminated, Contractor shall make available to the University all records, documents and data pertaining to the Services within ten (10) calendar days after such termination.

2. Contract Responsibilities

2.1 Contractor Responsibilities – General

2.1.1 Project Team

2.1.1.1 Contractor shall designate a Senior Event Manager for this Project. The Senior Event Manager shall:

a. Serve as principal liaison between CUNY and CUCF and the Consultant for purposes of administration of the Contract;
b. Be an employee of the Consultant (and not a contractor or subcontractor); and
c. Have full decision-making authority on behalf of the Consultant including authority to obligate the Consultant.

2.1.1.2 Consultant shall ensure that CUNY and CUCF shall have access at all times to an individual with full authority to make decisions on behalf of the Consultant. Nothing in this section shall be deemed to preclude CUNY and CUCF from discussing any matters relating to the Contract with any other members of the Consultant's organization.

2.1.2 Return of CUNY Information at Termination

Within ten (10) calendar days of termination of Services for any reason, the Consultant shall, with respect to all original CUNY and CUCF documents and data, in whatever media, whether originally provided or created during performance of the Services:

2.1.5.1 Return them to CUNY; and/or

2.1.5.2 Provide independent certification of destruction of all copies.

2.1.3 Use of Former CUNY Employees

Contractor shall comply with **Attachment A** when proposing former CUNY employees as members of the Project Team.

2.1.4 Invoices

2.1.4.1 Contractor shall submit invoices directly to the Accounts Payable Department at the Office of University Controller (OUC) at Invoices@cuny.edu at a time interval and in a format approved by CUNY.

2.1.4.2 Contractor shall provide sufficient and appropriate documentation with invoices and provide additional information related to the invoices at any time upon request by CUNY.

2.1.4.3 CUNY will pay Contractor only upon receipt of properly prepared invoices with supporting documentation. Invoices are subject in all respects to CUNY's approval. Services shall be performed to the satisfaction of CUNY and payment for any Services performed by Contractor remains subject to acceptance of such Service by CUNY.

2.1.4.4 CUNY will not pay Contractor for work performed beyond the scope of the Contract or for services not duly authorized.

2.2 Scope of Services and Deliverables

2.2.1 Overview

The City University of New York and the City University Construction Fund jointly supports an annual conference to promote and encourage business opportunities for NYS-certified Minority and Women-owned Business Enterprises (MWBEs) and NYS-certified Service-Disabled Veteran Owned Businesses, and those that aspire to be, in this conference to be held on **August 11, 2016**. The Consultant will work with the Conference Committee to produce an impactful, purposeful, content-rich conference and ensure that all programmatic elements meet the needs of the MWBE and SDVOB community.

The primary objective of the annual Event is to educate existing businesses on how CUNY and CUCF procure goods, services and construction and to promote business opportunities available at the University. Our target audiences are NYS-certified MWBEs, NYS-certified SDVOBs and those who aspire to be certified by NYS. CUNY and CUCF expects that the Consultant will at minimum conduct media outreach within New York State, New Jersey, and Connecticut. CUNY does not expect the Consultant to provide transportation; off-site events; or housing options to any of the attendees.

2.2.2 CUNY's and CUCF's Assumptions Regarding Contractor Approach

CUNY's and CUCF's assumptions regarding which approach will most likely achieve the goals and objectives set out above are:

- *Project Management*. The selected Consultant must be able to successfully and efficiently perform all Services and provide all deliverables identified in this RFP within designated timelines and by the respective deadlines.

- *Proactive*. The selected Consultant should be proactive in their approach to providing the services and deliverables required by the resulting contract award.

The proposer should approach CUNY and CUCF's with new cost-saving ideas that achieve the same results more effectively.

- *Creative.* The selected Consultant should be creative in their approach to addressing practical issues that may surface during the term of the resulting contract so that positive tangible results are produced. Ideally, the selected Consultant must demonstrate a willingness to think through and implement new ideas with CUNY and CUCF that are rooted in the Consultant's previous experience.

2.2.3 Tasks and Deliverables

The Consultant will be responsible for working with CUNY, CUCF and other key participants to provide efficient and professional event planning consultant services (as further described in this RFP, the "Services") in connection with the seamless planning, production, coordination, marketing and presentation of the CUNY & CUCF supplier diversity conference ("Event"). Specifically, the Consultant will be responsible for providing the following services and deliverables in connection with this major networking Event:

1. **Event Management.** The Consultant will be responsible for providing the following "Event Management" Services:

   - **Project Plans and Periodic Reports.** Create a detailed project management plan and checklist of responsibilities, complete with a timeline of when each task is to be completed and an indication of the party responsible for each task (*e.g*. Consultant, CUNY, CUCF, Exhibitor, etc.), which shall be subject to CUNY's prior approval. In addition, Consultant must provide the following;
     a. Submit written updates and progress reports to CUNY, CUCF such as, but not limited to, providing Event registration reporting and progress activity reporting;
     b. Attend all Conference Committee meetings (monthly meetings are anticipated to commence in **May, 2016** and accelerate to bi-weekly meetings closer to the Event date. Meetings will continue up to two months after the Conference); and
     c. Manage a running list of follow-up/action items from the status updates and other meetings to ensure that all tasks necessary to create a successful event are accomplished;
   - **General Coordination**. Assist with coordination of key participants, including but not limited to, workshop instructors, speakers, panel members, third party vendors, VIPs, CUNY, CUCF, and Contractor staff

working at the Event (as identified or approved by CUNY, the "Event Staff") staff, attendees, Exhibitors, and designated Venue representative(s);

- **Event Theme.** Develop a cohesive brand strategy and theme for the 2016 Event while incorporating both CUNY and CUCF's brand. Last year's concept was CUNY/CUCF 24: Contract Opportunities Conference.
- **Event Floor Plan**. Create a floor plan identifying Exhibitor tables assigned, numbered, and labeled with Exhibitor names and a key. The floor plan, which is subject to CUNY's and CUCF's approval, must be in a user-friendly format, be visually pleasing and capable of being printed on letter or legal-sized paper for distribution to attendees and Exhibitors on the Event-day.
- **Event Phone Number.** Establishing a local phone number (e.g. 718, 212, 347, 646) to be used by invitees, registered participants, Exhibitors, etc., for Event-related questions. Consultant must;
  a. Assign a knowledgeable, friendly and reliable staff member to handle any Event-related questions received by phone during standard business hours. The assigned staff member must have access to any tools or information necessary to respond to inquiries and assist with any registration problems.
  b. Establish a messaging system to handle Event-related questions received outside of standard operating hours;
  c. Establish a protocol to ensure that all messages received after standard business hours are responded to within 24 hours;
  d. Establish a protocol to ensure that all non-Event questions are appropriately and expeditiously routed to CUNY and CUCF.
- **Event Email Address.** Maintain the CUNY and CUCF conference e-mail address (*info@cunybiz.com*) to be used by invitees, registered participants, Exhibitors, etc., as an alternate means to submit Event-related Questions or request additional Event-related information.
- **Event Name Badges.** Be responsible for developing, printing, and delivering name badges ("Badges") for all registered attendees, Workshop Instructors, Panel Members, Exhibitors, Event Staff, VIPs and other Event participants as specified by CUNY and CUCF. In addition, Badges must:

e. Be at least 4.5" X 3.5", color-coded by attendee type, and connected by a strap that goes around the attendee's neck. Consultant must not use pins to affix Badges to the individual. Badges must be color coordinated based upon Event participant type (*e.g.* attendee, Exhibitor, workshop instructor, panel member, Event staff);

f. Badges must include the individual's name and the name of the business he/she represents, if applicable;

g. Badges must indicate if the attendee is NYS-certified MWBE and or SDVOB;

h. Ninety percent (90%) of the Badges must be completed at least one (1) week prior to the Event;
i. On Event day, the Badges must be completely in a manner conducive to efficient attendee check-in by 7am; and
j. Establish on-site attendee registration and Badge creation tables.
   - **Event Supplies**. Provide all supplies for on-site registration.
   - **Event Venue Coordination.** The Consultant will be required to coordinate all Venue-related components of the Event. This includes, but is not limited to:
     a. Work with designated Venue management team/representatives to coordinate pre-Event and Event-day set-up, delivery of Exhibitor materials, and delivery of food, supplies, decorations, gift bags, promotional items, and signage from third-party vendors.
     b. Work with CUNY and CUCF, and designated Venue representatives to ensure that appropriate rooms are reserved and that all equipment and supplies are properly accounted for; and
     c. Coordinate and participate in pre-Event site visits and walk-thru meetings as well as any other site visits or walk-thru meetings identified by CUNY and CUCF either before the Event or on the day of the Event.

2. **Speaker Selection and Coordination.** The Consultant will make recommendations and coordinate outreach to prospective speakers of the utmost quality and relevance to determine availability and secure attendance. Last year's keynote speaker was Tawan Davis, Chief Investment Officer, The Peebles Corporation.

3. **Event Marketing and Promotion.** The Consultant will facilitate all components of pre-event advertisements and announcements.
   - Event Cost. Propose, and if approved by CUNY and CUCF, implement an approach to cover a portion of the costs associated with executing this EVENT, through a fair and reasonable Exhibitor fee structure. The final Exhibitor fee structure, if any, must be pre-approved by CUNY and CUCF.
   - **Develop and Distribute.** Prepare advertisements, announcements, and press release copy of the conference information, including but not limited to, timing/schedule of advertisements in widely circulated print and digital media and creating postcards and other media to be distributed at other Events. ***Note:*** Consultant is responsible for submitting a budget for both print and electronic advertisements. The University will procure the advertisements
   - **Press Release.** Prepare press release in several languages, including but not limited to English and Spanish.

- **Design Concepts.** Prepare design concepts consistent with the conference theme while adhering to CUNY's branding standards. CUNY's Brand Book is available at www.cuny.edu/id.
- **Outreach to Potential Attendees.** Manage outreach to prospective Exhibitors and Attendees. CUNY and CUCF anticipates over 600 attendees and more than 60 exhibitors for the purposes of maximizing value of the Event to the attendees.

Online Registration Management System and Website. The Consultant will be responsible for the following Online Registration Management System and Conference website (www.cunybiz.com).

- **Online Registration Management System.** Be responsible for the implementation and administration of an Online Registration Management System that will primarily be used to invite, register and track MWBE and SDVOB attendees.
- **Conference Website ("Website").** Be responsible for the customization and administration of the Conference Website including any additional web design required to tailor the Website to match the proposed theme of the conference. The Website must have the following components and functionalities:
  a. Landing Page (a public page to provide basic event information; include links to the Registration Page and the Resource Page);
  b. Registration Page (to allow the user to enter their information);
  c. Resource Page (to allow attendees to download pertinent event information prior to the event.
  d. Allow for individuals to select and register for workshops using a pre-designed and pre-populated options list, if appropriate;
  e. Automatic email confirmations/thank you page upon successful registration; confirmation email must include a link to the Resource page;
  f. Automatic email reminders to unregistered invitees;
  g. Ability to send "Event Reminder" emails a few days before the Event to all registered attendees. This Event Reminder email must contain Event details, selected workshops, and a link to the Resource Page;
  h. Ability for users to download documents, pdfs, attachments, etc. using Microsoft Word and Adobe Acrobat (all of which should be accessible via the Resource Page);
  i. Post all relevant conference information, including but not limited to program information; location; other pertinent information;
  j. Enables the Consultant to create and submit to CUNY and CUCF weekly reports on registration status and progress activity; and

k. Post selected photos of the Event after the Event date.

- **Direct Follow-Up Contact with Certain Event Invitees**. Be responsible for contacting firms with "bounce-back"/non-deliverable e-mail addresses to assist with registration as well as following up with firms that do not register on an "as needed" basis to ensure that the Event's RSVP limit is met.

4. **Exhibitor Registration.** The Consultant will be responsible for the following "Exhibitor Registration" Services: Invitation creation, distribution, registration, and ongoing registration management of the Event's Exhibitors, which include CUNY campuses and Prime Contractor Exhibitors. ***Note***: the Exhibitor Invitation is subject to CUNY's and CUCF's approval. In addition, the Exhibitor Invitation List will be provided to Consultant by CUNY and CUCF in advance.
   - The Exhibitor Invitation must identify Consultant as the primary contact for Exhibitor questions, issues, and concerns regarding registration for the Event and it must include the Consultant's Event-designated e-mail address, phone and fax numbers for registration purposes.
   - Consultant will be required to follow-up with unregistered Exhibitors included on the initial Exhibitor Invitation List provided by CUNY & CUCF, as needed until the RSVP Exhibitor Goal for the Event has been met.

5. **Conference Program Booklet.** The Consultant is expected to develop and create the "Conference Program Booklet" which will be distributed at the Event. The booklet – at minimum – is expected to include the program, welcome message, bios of guest speakers, information on Workshops, and other pertinent information for the Event. ***Note:*** The Consultant is not expected to secure print services but will be required to work with the selected printing vendor to ensure delivery of the program booklet before the start date and time of the Event. **The final "print-ready" Conference Program Booklet must be provided at least one week prior to the Event.**

6. **Workshops.** The Consultant will be responsible for working with CUNY and CUCF to suggest potential workshops that benefit MWBEs and SDVOBs. Additionally, the Consultant is expected to coordinate the effective scheduling, set-up and delivery of Event Workshops offered.

7. **Expanding Networking Opportunities**. The Consultant will be required to work with CUNY and CUCF to develop, implement and coordinate the expanded networking portion of the Event which is for procurement and/or

program staff invited to participate in a networking opportunity that goes beyond the traditional networking booths. In preparation for the expanded networking event, Consultant will be responsible for proposing new strategies for the Event to expanding upon positive approaches and techniques that have demonstrated success at other conferences. The goal of the expanding networking opportunities is to promote strategic networking opportunities that have not been available in the traditional networking booth setting.

8. **On-Site Logistical Management**. The Consultant will be responsible for the following "On-Site Logistical Management" Services:
   - **Staffing**
     a. Ensure that at least six (6) professional staff members are present at all times between 7am to 5pm on the Event day to assist with successful execution of the Event.
     b. Guarantee that all staff members are properly trained for the duties they will be performing on the day of the Event.
     c. Consultant will need to provide staff members as needed prior to the Event for set-up, bag-stuffing, last-minute phone calls, etc.
   - **Event Speaker Coordination.** Coordinate Event speakers including, but not limited to, the Master of Ceremonies (MC) to facilitate the Opening Session. The Consultant will be responsible for securing the MC with the approval of CUNY and CUCF.
   - **Workshop Instructors and Panel Members**
     a. Coordinate workshop instructors and workshop panel members.
     b. Contact Workshop Instructors and Panel Members in advance of the Event to secure bios, photos and any other applicable documentation;
     c. Confirm Event logistics in advance as well as on Event day as may be requested by the CUNY and CUCF. This shall include, but is not limited to, coordinating with Workshop Instructors and Panel Members regarding the collection, reproduction and distribution of Workshop/Panel materials and to identify any specific needs or requests that these groups may need or require for the Event.
   - **Exhibitor Coordination.** Consultant will be required to coordinate with exhibitors including, but not limited to, the set-up of Exhibitor areas and detailed instructions including set-up and break-down time for Exhibitors as approved by CUNY and CUCF.
   - **Audio & Visual Coordination.** Consultant will be required to coordinate all A/V technical products, equipment set-up, and technical staff for on-site assistance, if required, on Event day, with John Jay College and CUNY Office of Computing and Information Services staff. Additionally, Consultant will be responsible for coordinating with A/V contacts, as

required, for a seamless and successful event and ensuing that all A/V equipment and technical requirements are properly accounted for. Consultant may provide all of the required "Audio & Visual Coordination" services directly or through a CUNY and CUCF-approved contractor. The Consultant will be expected to recommend at least three vendors for consideration by the Conference Committee. The University will procure these services.

- **Event Photography/Videography.** The Consultant will be required to work with CUNY and CUCF and any CUNY and CUCF-approved photography and video production services contractor to coordinate the successful delivery of these services for the entire duration of the Event. The Consultant will be expected to recommend at least three vendors for consideration by the Conference Committee. The University will procure these services.
- **Catering.** The Consultant will be responsible for coordinating Event "Catering Services" either directly or through a CUNY and CUCF-approved food service provider. Notwithstanding the previous sentence, the Consultant may be required to use the Venue's designated caterer. In addition, Consultant will be required to coordinate menu selection, food delivery, preparation, set-up and clean-up with the caterer to ensure a successful and smooth catering experience for the Event. The Consultant will be expected to recommend at least three vendors for consideration by the Conference Committee. The University will procure these services.
- **Signage**. The Consultant will be required to work with CUNY and any CUNY approved subcontractor/consultant signage provider to coordinate and place CUNY and CUCF -approved Event signage throughout venue, including but not limited to, table tents for exhibitors; signage announcing the Event and workshops; podium signage; and directional signage. The Consultant will be expected to recommend at least three vendors to signage for consideration by the Conference Committee. The University will procure these services.
- **Gift Bag Distribution**. Distribute Event "gift bags" to attendees. The Consultant will be required to work with CUNY and CUCF and any CUNY and CUCF approved subcontractor/consultant promotional/incentive items provider or distributor to coordinate, fill and distribute CUNY and CUCF-approved "gift bags" and promotional items, if any, to Event attendees and participants. The Consultant will be expected to recommend at least three vendors for consideration by the Conference Committee. The University will procure these services.

- **2-Way Radios.** The Consultant will be required to provide 2-way radios (e.g. Walky-Talky) for communication between Event Staff. The selected vendor is expected to provide the 2-way radios.

9. **Evaluations and Post-Event Management**
   - Provide written reports to CUNY and CUCF on budgets, attendance, suggestions for next year's Conference.
   - In conjunction with CUNY and CUCF, develop the following "Event Surveys/Evaluations":
     a. Attendee Event/Workshop Survey;
     b. Exhibitor Survey;
     c. Workshop Instructor Survey; and
     d. Staff Survey.
   - Lead the distribution and collection of all of the surveys created.
   - Analyze and create a concise report of the data received on the surveys.
   - Create and distribute a generic Thank You e-mail message to all MWBE and SDVOB attendees.
   - Create and distribute personalized Thank You letters to VIPs, guest speakers, workshop presenters, and exhibitors.
   - **Potential Post-Event Newsletter for Distribution.** Prepare at least two (2) separate brief e-mail newsletters to be distributed at time required by CUNY and CUCF, which are estimated to be in **November, 2016 and March, 2017,** highlighting new CUNY and CUCF information and announcement of upcoming CUNY and CUCF conferences.

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3. Proposal Format and Contents

3.1 General Procedures

3.1.1 To be responsive to this RFP, and for the purposes of evaluation, each Proposal must consist of the following parts, as further described below:

- Cover Letter;
- Technical Proposal - Volume I; and
- Price Proposal - Volume II.

3.1.2. Volume I and Volume II of the Proposal should be complete so the evaluation of both Volume I and Volume II can be accomplished expeditiously and effectively, and the Technical Proposal can be evaluated strictly on the basis of its merits. **Price information is <u>not</u> to be included in the Volume I submittal.**

3.1.3 Information should be consistent across submitted documents. CUNY reserves the right to:

3.1.3.1 Reject Proposals submitted with conflicting information; and

3.1.3.3 View non-compliance with this section or failure to provide information and/or required forms as non-responsive.

3.1.4 CUNY will protect confidential and proprietary information from disclosure to the extent permitted by the Freedom of Information Law ("FOIL"), Article 6 of the Public Officers Law. Accordingly, Proposers should identify those page(s) of their Proposal which they believe contain such information as "confidential and proprietary." In addition, Proposers need to explain the reason(s) why this information should be considered exempt from public disclosure under FOIL. **Include the identification of pages that contain "confidential and proprietary information" and the reasons for exemption of such "confidential and proprietary information" in the Cover Letter of the Proposal.**

3.1.5 Proposers are to submit a complete Proposal in response to the RFP, using the format defined herein. Proposers are to tabulate and paginate their Proposals, and clearly mark sections with the Section number to which they are responsive.

3.2 Cover Letter

The Proposer must submit the Cover Letter on official business letterhead. The Cover Letter is to include the following:

3.2.1 The signature of an official authorized to bind the Proposer.

3.2.2 A statement certifying that the Proposal, including the technical and price components, shall remain valid for at least 270 calendar days.

3.2.3 A statement that the Proposer meets all the minimum requirements described in the RFP (see Section 1.4).

3.2.4 A statement affirming that neither the Proposer nor any individual assigned to provide the Services to CUNY and CUCF has any conflicts of interest with CUNY or CUCF, or their respective governing bodies, committees or employees. If Proposer cannot provide such a statement because of a conflict of interest, it shall instead state the nature of the conflict and describe the provisions that will be made to address the conflict.

3.3 Volume I: Technical Proposal

The Proposer is to submit **four (4) hard copies** clearly identified with the Proposer's name and the words "Event Planning and Management Consulting Services, Volume I Technical Proposal. Volume II - Price Proposal **must** be submitted as a separate document from the technical proposal.

3.3.1 Title Page

Include the following information: Name, address, phone number and email address of the Proposer including a contact person, and name and title of the person(s) who prepared the Proposal.

3.3.2 Executive Summary

Provide a brief overview of your firm and why your firm is qualified to provide the event management services as outlined in this RFP. Your summary should include what sets you aside from the other firms.

3.3.3 Scope of Services and Coordination with CUNY & CUCF

Provide a narrative description not to exceed five (5) double-sided pages, which demonstrates a thorough understanding of the tasks outlined in Section 2.2 Scope of Services and Deliverables, and how your firm will provide the services and complete the deliverables in a timely manner. Additionally, please demonstrate how your firm's approach will fulfill CUNY's and CUCF's goals and objectives. Your response should address at a minimum, the following requirements:

- *Project Management*. The selected Consultant must be able to successfully and efficiently perform all Services and provide all deliverables identified in this RFP within designated timelines by the respective deadlines.

- *Proactive*. The selected Consultant should be proactive in their approach to providing the services and deliverables required by the resulting contract award. The proposer should approach CUNY and CUCF with new cost-saving ideas that achieve the same results more effectively.

- *Creative.* The selected Consultant should be creative in its approach to addressing practical issues that may surface during the term of the resulting contract so that positive tangible results are produced. Ideally, the selected Consultant would demonstrate a willingness to think through and implement new ideas with CUNY and CUCF that are rooted in the Consultant's previous experience.

In addition:

- To help CUNY and CUCF understand your firm's thought process and creative approach, please provide your ideas of how to expand networking opportunities for MWBE and SDVOB firms with CUNY and CUCF staff outside of the traditional networking booths. Please be creative. CUNY and CUCF are looking for concepts that leverage the potential benefits of match-making and speed networking while also incorporating new ideas to mitigate the shortcomings of these "newer" approaches to networking. **DO NOT** leave your best ideas for the possible interview and presentation following the submission of written proposals.

Note: The University's assumptions regarding the Contractor's approach represent what the University believes to be most likely to achieve its goals and objectives. However, Proposers are encouraged to propose an approach that they believe will most likely achieve the University's goals and objectives. Proposers may also propose more than one approach. However, if an alternative approach affects other areas of the Proposal such as experience, organizational capability or price, that alternative approach should be submitted as a complete and separate proposal providing all the information specified in this RFP and must be clearly labelled "Alternative Proposal".

3.3.4 Proposer Experience

Describe the successful relevant experience of the proposer, each proposed subcontractor if any, and the proposed key staff in providing the work described in this RFP. Specifically, proposals should address the following:

- Experience and qualifications of the team that will be working on this event, including primary lead event planner and other secondary event planner(s).
- Attach for each key staff position a resume and/or description of his/her qualifications that will be required. In addition, provide a statement certifying that the proposed key staff will be available for the duration of the project.
- Provide a description of the organization and management structure. Identify how the organization carries out mission-essential and other support tasks, define operational procedures, provide a description of how the organization improves its mission, and how decisions are managed.
- Provide a list of the Proposer's Core Competencies

3.3.5 Minimum Qualification Requirements

Demonstrate that the Proposer meets the minimum qualification requirements set out in Section 1.4.

3.3.6 Company References

For at least two (2) separate events planning, completed and/or ongoing, within the last three (3) years, provide the following information.

- Name(s) of the client(s) and a brief client description;
- Description of the event, including an overview of the services provided;
- Contact information for the key event organizer.

3.4 Volume II – Price Proposal

3.4.1 **As a separate document**, the Proposer must submit its price proposal **in a separate sealed envelope** that is clearly labelled on the outside with the Proposer's name and the words **"Event Planning and Management Services, Volume II — Price Proposal".** Volume II materials must be submitted separately and in separate sealed envelopes from Volume I.

3.4.2 Proposer must sign and submit with its Price Proposal the Procurement Lobbying Act forms attached to this RFP as Attachment C.

3.4.2 Proposer must complete the below cost matrix and submit as its Price Proposal. All pricing submitted must be all inclusive.

Year One Pricing:

PRICE MATRIX		
TASK	HOURS	TOTAL
OVERALL EVENT MANAGEMENT		$
SPEAKER SELECTION AND COORDINATION		
EVENT MARKETING AND PROMOTION		
ONLINE REGISTRATION MANAGEMENT SYSTEM AND WEBSITE		
EXHIBITOR REGISTRATION		
CONFERENCE PROGRAM BOOKLET AND OTHER PRINTED MATERIALS		
ON-SITE LOGISTICAL MANAGEMENT & COORDINATION OF WORKSHOPS		
EVALUATION AND POST-EVENT MANAGEMENT		
TOTAL EVENT FEE – YEAR ONE		$

Option Year Pricing:

PRICE MATRIX		
TASK	HOURS	TOTAL
OVERALL EVENT MANAGEMENT		$
SPEAKER SELECTION AND COORDINATION		
EVENT MARKETING AND PROMOTION		
ONLINE RGISTRATION MANAGEMENT SYSTEM AND WEBSITE		
EXHIBITOR REGISTRATION		
CONFERENCE PROGRAM BOOKLET AND OTHER PRINTED MATERIALS		
ON-SITE LOGISTICAL MANAGEMENT & COORDINATION OF WORKSHOPS		
EVALUATION AND POST-EVENT MANAGEMENT		
TOTAL EVENT FEE – OPTION YEAR		$

TOTAL PROPOSAL PRICE:
$_____
(Total Event Fee - Year One + Total Event Fee – Option Year)

4. Reservations of Rights

In addition to any other rights described in this RFP, CUNY reserves the following rights:

4.1 to accept or reject any or all Proposals, including without limitation to reject a Proposal if:

4.1.1 the Proposer does not provide any part of the information or documents required by the RFP;

4.1.2 the Proposer misstates, misleads, or conceals any material fact in its Proposal or at any time in connection with this RFP;

4.1.3 the Proposal is not in compliance with law;

4.1.4 the Proposal is not responsive to the requirements of this RFP or the requirements of the Contract terms and conditions;

4.1.5 any part of the Proposal, such as the Price Proposal, is conditional;

4.1.6 the Proposal, in the opinion of CUNY, contains unbalanced prices; or

4.1.7 a determination that the Proposer is not "responsible" (as defined by law) is made in accordance with law or CUNY regulations.

4. 2 to re-issue a solicitation;

4.3 to correct any arithmetic errors in any or all Proposals;

4.4 to use or adopt any or all of a successful Proposer's Proposal;

4.5 to negotiate modifications to the scope, Contract terms and conditions and fee with the selected Proposer prior to contract award;

4.6 to reject Proposals containing material deviations (as that term is construed by New York State law), and/or permit Proposer(s) to amend one or more non-material items in their Proposal(s) to comply with this RFP and/or waive or modify minor irregularities in Proposals;

4.6.1 In the event of a discrepancy between the Proposal Price as stated in words and as stated in numbers, or as stated on any other part of a Proposal, the University reserves the right to deem the lower price to be the Proposal Price.

4.6.2 In the event of an arithmetic error in Proposer's multiplication of the unit price by the quantity of that item specified, University reserves the right to make the arithmetic correction and deem the corrected amount the Proposal Price.

4.7 to seek clarifications concerning Proposals;

4.8 to amend the RFP after its Release Date upon appropriate notification;

4.9 to issue Requests For Additional Information ("RFAIs") to Proposers;

4.10 to require Short-Listed Proposers to attend Presentations;

4.11 to issue Required Questions to Short-Listed Proposers before such -Presentations;

4.12 to include in their final score evaluation of Answers to Required Questions and such additional materials as Proposers provide;

4.13 to contact all Proposer references during the Proposal Evaluation process;

4.14 to ask Short-Listed Proposers for Best and Final Offers;

4.15 to terminate negotiations with a prospective awardee if negotiations of legal terms and conditions raised by Proposer are unsuccessful, in CUNY's sole and absolute determination;

4.16 upon terminating negotiations as contemplated above, to negotiate with the next highest scoring Short-Listed Proposer.

5. Evaluation of Proposals:

Proposals shall be evaluated using a Best Value Method evaluation process based on the technical and price proposal criteria below. Technical considerations are of greater importance than pricing considerations; however, price is a significant factor in CUNY's and CUCF's evaluation of proposals.

Proposal Scoring Criteria and Weights

Step	Title	Scoring Method	Maximum Score
1	**Minimum Requirement**	pass/ fail	pass/ fail
2	**Technical Proposal**	Scored	
	Proposer's understanding of the scope of services		30
	Quality of proposed approach		35
	Proposed project team, including experience and qualifications of each proposed individual.		20

Step	Title	Scoring Method	Maximum Score
4	**Price Proposal**	Scored	15
	Total Score		**100**

1. Proposal evaluation will be conducted by a representative committee ("Committee"). Committee members will score each proposal individually and then meet as a group to discuss and short list the Proposals. Evaluators will be allowed to revise scores on the basis of Committee discussions. The average Technical Score for each Proposal will consist of the sum of each Committee Member's technical Score divided by the number of Committee members.

2. Proposers responding to this RFP may be requested to clarify issues or to provide additional insights into their proposal through written clarifications. If written clarifications are required to complete the technical evaluation of proposals, evaluators will be allowed to revise their technical scores based on this additional information.

3. The Office of the University Controller will perform scoring of the Price Proposals. Proposed pricing of the Contract for the Proposer will be used for calculation purposes. The Proposer with the lowest proposed price will receive the maximum Price Proposal score of fifteen (15) points and higher proposed prices will receive proportionately lower Price Proposal scores.

4. CUNY's Office of the University Controller will add the average Technical Proposal score to the Price Proposal score for each proposer team to arrive at each proposer's total score. The top three (3) highest scoring firms will be designated as the "Short-Listed Proposers." If less than three (3) Proposals are received then CUNY's Office of the University Controller may determine the appropriate number of Short-Listed Proposers in its sole and absolute discretion.

5. The selection Committee is under no obligation to interview or request a presentation of or by any Proposer and may invite the Proposer with the highest total score to enter into negotiations.

6. Calculation of Short-Listed Proposer's Total Proposal Score.

The Total Score for a Proposal is the sum of the Short-Listed Proposer's Technical Proposal, Price Proposal scores for a possible maximum Total Proposal Score of one hundred (100) points. CUNY reserves the right to request Best and Final Offers ("BAFOs") from the Short-Listed Proposers. Should CUNY exercise this right, CUNY will request a BAFO from each Short-Listed Proposer. CUNY will revise the Technical Proposal and Fee Proposal scores of the Short-Listed Proposers, as necessary, based on information submitted in their BAFOs and using the criteria above.

Nothing in this Section or this Request for Quotation shall prevent the selection committee from requesting Proposers to provide supplemental or explanatory information regarding their proposal at any time prior to the selection of a Proposer to be invited to enter into contract negotiations.

An award shall be made to the Proposer whose Proposal receives the highest total Proposal score after considering the technical and price evaluation factors.

7. **Award and Debriefing**

CUNY shall award this Contract, if at all, on the basis of best value to a responsive and responsible offeror as these terms are defined by New York State Finance Law Article 11, Section 163. Any award under this RFP shall be conditioned upon the Contractor executing and delivering to CUNY the Contract, and such other documents, forms, disclosures and the like required by CUNY.

At the conclusion of the evaluation period, all Proposers will be notified of their respective standing on this solicitation. Unsuccessful proposers may request a debriefing of their Proposal by sending a request in writing, postmarked within 30 days of being notified of being unsuccessful, to the Designated Contact identified in this RFP for this solicitation.

ATTACHMENT A:

Contractor's Responsibility when Proposing Former CUNY Employees

Contractor's responsibility when proposing former CUNY Employees as staff for the Project.

It is the Contractor's responsibility to ensure it proposes staff that is eligible to work on the proposed project. It is an individual's responsibility to comply with the Public Officer's Law.

The following procedure applies if either of the following criteria is met.

- It is two years or less between the date that the individual is proposed and the individual's date of separation from the State.

- The individual proposed has worked on the project while employed by CUNY regardless of how long ago they left CUNY.

<u>Procedure</u>

- Before the contractor proposes an individual, the individual must obtain an opinion from the New York State Joint Commission on Public Ethics that approves their participation in the project as they are proposed.

- A copy of this opinion must be on file in the contractor's office and available for review by CUNY if requested.

- Failure to obtain New York State Joint Commission on Public Ethics approval for an individual's participation in a project may jeopardize the firm's designation for that project.

ATTACHMENT B

FORM OF AGREEMENT

INDEPENDENT CONTRACTOR AGREEMENT

Attachment C: Procurement Lobbying Act and Forms

Note: all references to "CUNY" in this Attachment shall be deemed to include CUCF.

Procurement Lobbying Act

1. **Required Forms:** The consultant shall sign submit the following forms with their Price Proposals (Volume II). These forms are part of and due with the Proposal.

   a) **"Offerer's Affirmation of Understanding of and Agreement pursuant to State Finance Law §139-j (3) and §139-j (6) (b)"**
   b) **"Offerer Disclosure of Prior Non-Responsibility Determinations".**

2. **CUNY Guidelines and Procedures**

   Under the requirements of the State Procurement Lobbying Act all communications regarding advertised projects are to be channeled through the Designated Contact below. Communication with any other CUNY employee concerning this project during the restricted period (i.e. from advertisement through designation) that is determined to be an attempt to influence the procurement may result in disqualification.

3. **Summary of the policy and prohibitions regarding permissible contacts**

   a) Contacts prior to designation:

   Any communications during the restricted period are only permitted with the following Designated Contact:

   Ayla Bakkalli
   City University of New York
   230 W. 41st Street
   5th Floor
   New York, N. Y. 10036
   Attention: Event Planning and Management Consultant Services
   Phone: (212) 397-5649
   Email: ayla.bakkalli@cuny.edu

   These are some communications during the restricted period exempted from this restriction:

   - Submission of a Proposal;
   - Submittal of written questions as part of the solicitation process;
   - Ministerial communications concerning due dates or contact information;
   - Participation in a pre-proposal conference or site visit;
   - Complaints by an offeror to CUNY's Office of General Counsel where the Designated Contact fails to respond in a timely manner;

- Negotiations with the University after notice of a tentative contact award;
- Debriefings about a procurement contract award; or
- Filing of written disputes in administrative hearings, judicial proceedings and to the State Attorney General, Inspector General, or Comptroller, or the City District Attorney.

If any other CUNY employee is contacted and they believe a reasonable person would infer that the communication was intended to influence the procurement, the contact must be reported by the CUNY employee. If the University determines an impermissible contact was made, that offerer cannot be awarded the contract. A second violation would lead to a four year bar on the award of public contracts to the offerer.

b) Contacts after designation

Contacts made in connection with negotiations with CUNY after the notice of a tentative contract award has been issued are permissible. If a tentative contract award has been made, additional CUNY personnel may be contacted to negotiate terms of the contract. CUNY may identify individuals authorized to negotiate contracts on its behalf including:

- the Office of the University Controller designated analyst
- the Office of the University Controller Associate Controller
- such other staff as may be identified by CUNY

While the law does not specifically limit who may be contacted during the negotiation process, CUNY must identify the individuals authorized to negotiate a contract on its behalf and communications in connection with contract negotiations must be directed to only those individuals identified by CUNY. However, if any CUNY employee is contacted and they believe a reasonable person would infer that the communication was intended to influence the procurement, the Contact must be reported by the CUNY employee as described above.

c) Information Required from Offerers that contact CUNY staff, prior to contract approval by the Office of the State Comptroller:

The individuals contacting CUNY should refer and shall be prepared to provide the following information, either by e-mail or fax as directed by CUNY:

Person's name, firm person works for, address of employer, telephone number, occupation, firm they are representing, and whether owner, employee, retained by or designated by the firm to appear before or contact CUNY.

d) Applicability to an executed contract

Restrictions similar to those described above apply to approval or denial of an assignment, amendment (other than amendments that are authorized and payable under the terms of the procurement contract as it was finally awarded or approved by the comptroller, as applicable), renewal or extension of a procurement contract, or any other material change in the procurement contract resulting in a financial benefit to the offerer. The staff noted above as well as the project manager and consultant manager are considered designated contact persons. The University may identify other contact persons for each of these processes.

4. **For more information on this law** please visit http://www.ogs.ny.gov/acpl or contact the Designated Contact listed above.

Offerer's Affirmation of Understanding of and Agreement pursuant to State Finance Law §139-j (3) and §139-j (6) (b)

Offerer affirms that it understands and agrees to comply with the procedures of the Government Entity relative to permissible Contacts as required by State Finance Law §139-j (3) and §139-j (6) (b).

Contract Procurement No.

By: _____ Date:_____

Name: _____

Title: _____

Contractor Name: _____

Contractor Address: _____

_____

_____

Form 1

Offerer Disclosure of Prior Non-Responsibility Determinations

Name of Individual or Entity Seeking to Enter into the Procurement Contract:
_____

Address: _____

Name and Title of Person Submitting this Form: _____

Contract Procurement Number: _____UCO-626_____

Date:_____

1. Has any Governmental Entity made a finding of non-responsibility regarding the individual or entity seeking to enter into the Procurement Contract in the previous four years?
(Please circle): No Yes
If yes, please answer the next three questions:
2. Was the basis for the finding of non-responsibility due to a violation of State Finance Law §139-j (Please circle): No Yes
3. Was the basis for the finding of non-responsibility due to the intentional provision of false or incomplete information to a Governmental Entity? (Please circle): No Yes
4. If you answered ***yes*** to any of the above questions, please provide details regarding the finding of non-responsibility below.
Governmental Entity: _____
Date of Finding of Non-responsibility: _____
Basis of Finding of Non-Responsibility: _____
_____
_____
_____
_____
_____
(Add additional pages as necessary)
5. Has any Governmental Entity or other governmental agency terminated or withheld a Procurement Contract with the above-named individual or entity due to the intentional provision of false or incomplete information? (Please circle): No Yes
6. If yes, please provide details below.
Governmental Entity: _____
Date of Termination or Withholding of Contract: _____
Basis of Termination or Withholding: _____
_____
_____
_____
_____
_____
_____
(Add additional pages as necessary)
Offerer certifies that all information provided to the Governmental Entity with respect to State Finance Law §139-k is complete, true and accurate.

By:_____ Date:_____
Signature
Name:_____

Title: _____ ***Form 2***