



110 SE Watula Avenue, Third Floor
Ocala, Florida 34471
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www.bidocala.com

The City of Ocala is accepting sealed electronic submissions for:

**EMPLOYEE EVENT PLANNING AND MANAGEMENT
REQUEST FOR PROPOSALS (“RFP”) #: CMO/240546**

Official copies of all solicitation documents may be obtained via electronic download from the City of Ocala’s e-procurement portal located at: <https://www.bidocala.com>

**** Copies of documents obtained from any other source are not considered official copies. ****

Solicitation Publication Date: 03/28/2024

Pre-Submittal Conference: NONE.

Deadline for Questions: 04/22/2024 at 5:00 p.m. (EST)

All questions or inquiries regarding this solicitation must be submitted via e-mail to the Buyer Contact identified below or via the e-procurement portal no later than the Deadline for Questions noted above. Any questions received after the deadline will not be considered.

Where to Submit Proposals: City of Ocala’s E-Procurement Portal:
<https://www.bidocala.com>

Submission Deadline: 04/24/2024 at 2:00 p.m. (EST)

Sealed electronic submissions shall be accepted up to the Submission Deadline. Submissions received after the deadline and/or transmitted to the City of Ocala outside of the e-procurement portal shall be rejected. The e-procurement portal’s timestamp shall be conclusive as to the timeliness of filing.

Vendor Registration: Bidders must be a registered vendor within the ProRFx e-procurement portal in order to submit a response to this Solicitation. **There is no charge to register, simply follow the registration path for “New Vendor Registration” at <https://www.bidocala.com>.**

**Buyer Contact/
Direct All Inquiries To:** BRITTANY CRAVEN, BUYER
E-Mail: bcraven@ocalafl.gov
Phone: (352) 629-8544

Notice to Proposers: The point of contact for all questions and issues relating to this Solicitation shall be the Buyer Contact identified above.

To ensure that your submission is deemed responsive, you are urged to request clarification or guidance regarding any issues involving this solicitation **prior to submitting** your response.

THE CITY OF OCALA RESERVES THE RIGHT TO REJECT ANY AND ALL SUBMISSIONS

SCOPE OF SERVICES

City of Ocala is requesting proposals from qualified event planners to provide the turnkey event planning and management services of one (1) annual employees and family event.

2.1. SCOPE OF SERVICES

(a) **Employee Family Fun Day:**

- (1) The event is held in March or early April of each year outside of the work week.
- (2) The average attendance is approximately 600 employees and family members.
- (3) Employees and family members are to be provided lunch and a drink.
- (4) The event must include activities for both adults and children.
- (5) Decorations, theme, location, activities, etc. will be decided by the Vendor.
- (6) A final plan for the Employee Family Fun Day is due to the City Project Manager by January 31st of each year.
- (7) The City of Ocala currently has approximately 1000 employees. The turnkey event planning fee from Vendor will need to accommodate up to the entire 1000 employees.
- (8) Vendor turnkey pricing (see Section (d) below) is for the planning and event management portion only and does not include the cost of food and pre-approved expenses.

(b) **Food:**

- (1) Prior to the event, the City of Ocala will provide the Vendor with an event budget for food, venue, decorations, and activities based on the estimated number of attendees.
- (2) Vendor will provide a minimum of three (3) menu options for the event for review and approval with the final plan submission. All expenses must be within the event budget.
- (3) After the City has selected the food and approved the final plan, the Vendor will make all arrangements for the venue. Based on the venue and venue deadlines, the Vendor may need to secure the venue before the menu options are presented to the City.
- (4) Vendor will forward invoices from providers to the City to pay as pass-through expenses, less taxes, since the City is tax exempt.

(c) **Management:**

- (1) Create, manage, and reconcile event budgets, expenses, and timelines. Adhere to project timelines and budget guidelines.
- (2) Evaluate, analyze, and report the results for the events to the Project Manager.
- (3) Provide project deliverables on time, on budget and to established expectations.
- (4) Direct the pre-event, and on-site day-of events.
- (5) Manage relationships with event vendors.
- (6) Direct and manage on-site event set up and clean up.
- (7) Manage and execute event debriefs to include the use of employee surveys as well as recommended improvements/changes.

(d) **Pricing:**

- (1) Vendor shall provide turnkey, lump sum pricing to plan and manage the Employee Family Fun Day.
- (2) Food and expenses provided for the events will be a direct pass-through cost to the City; no markup or overhead on food costs, or expenses, shall be paid to the Vendor.

2.2. PROPOSAL RESPONSE

- (a) Complete **Exhibit A- Proposal Response** including all requested information in the section labeled "Proposal Response."
- (b) For additional information on RFP terms, please refer to the General Terms and Conditions for the City of Ocala which are included in the Response Requirements section or at <http://bidocala.com/vendor-resources/>

SECTION 2

INSURANCE REQUIREMENTS, SUBMISSION INSTRUCTIONS, AND EVALUATION CRITERIA

INSURANCE REQUIREMENTS

- (c) **COMMERCIAL AUTO LIABILITY.** Awarded vendor shall procure and maintain for the life of this agreement commercial auto liability insurance with a minimum combined single limit of One Million Dollars (\$1,000,000) per occurrence for bodily injury and property damage arising out of vendor's operations and covering all owned, hired, scheduled, and non-owned automobiles utilized in said operations.
- (d) **COMMERCIAL GENERAL LIABILITY.** Awarded vendor shall procure and maintain for the life of this agreement commercial liability insurance with minimum coverage limits not less than:
- (1) One Million Dollars (\$1,000,000) per occurrence and Two Million Dollars (\$2,000,000) aggregate (or project aggregate, if a construction project) for bodily injury, property damage, and personal and advertising injury; and
 - (2) One Million Dollars (\$1,000,000) per occurrence and Two Million Dollars (\$2,000,000) aggregate (or project aggregate, if a construction project) for products and completed operations.
 - (3) Policy must include coverage for contractual liability and independent contractors.
- (c) **WORKERS' COMPENSATION AND EMPLOYER'S LIABILITY.** Awarded vendor shall procure and maintain for the life of this agreement adequate workers' compensation and employer's liability insurance covering all of its employees in at least such amounts as required by Chapter 440, Florida Statutes, and all other state and federal workers' compensation laws. Vendor shall ensure any and all subcontractors have the required coverage for all of their employees as required by applicable law. Vendor shall waive, and shall ensure that its insurance carrier waives, all subrogation rights against the City of Ocala and its officers, employees, and volunteers for all losses or damages.
- (d) **CITY AS ADDITIONAL INSURED AND ENDORSEMENTS.** The City of Ocala shall be named as an Additional Insured and Certificate Holder on all liability policies identified in this section with the exception of Workers' Compensation and Professional Liability policies. Awarded vendor's Worker's Compensation policy shall be endorsed with WC 00 03 13 Waiver of our Right to Recover from Others or its equivalent. Vendor's Commercial General Liability policy shall be endorsed with a CG 20 26 04 13 Additional Insured – Designated Person or Organization Endorsement or similar endorsement providing equal or broader Additional Insured Coverage with respect to liabilities arising out of activities performed by or on behalf of vendor.
- (e) **FAILURE TO MAINTAIN REQUIRED COVERAGE.** In the event that the awarded vendor fails to obtain or maintain in full force and effect any required insurance coverage, the City may procure same from insurance carriers as the City may deem proper, irrespective that a lesser premium for such insurance coverage may be available, and Vendor shall pay, upon demand by City, any and all premiums, costs, charges and expenses incurred or expended by City in obtaining such insurance. Notwithstanding the foregoing, in the event City is forced to procure the required insurance coverage due to awarded vendor's failure to comply with these Insurance Requirements, City shall in no manner be liable to awarded vendor for any insufficiency or failure of coverage with regard to same or any loss to Vendor occasioned thereby. Additionally, the procurement of such insurance coverage shall not relieve awarded vendor of its obligation to maintain said coverage in the types and amounts specified herein and awarded vendor shall nevertheless hold City harmless from any loss or damage incurred or suffered by City from awarded vendor's failure to maintain said coverage.
- (f) **OTHER MISCELLANEOUS INSURANCE PROVISIONS.**
- (1) These insurance requirements shall not relieve or limit the liability of awarded vendor. City does not in any way represent that these types or amounts of insurance are sufficient or adequate to protect awarded vendor's interests or liabilities but are merely minimums. No insurance is provided by the City under any contract to cover awarded vendor.

- (2) No work shall be commenced under any contract until the required Certificate(s) of Insurance have been provided. Work shall not continue after expiration (or cancellation) of the Certificates of Insurance and shall not resume until new Certificate(s) of Insurance have been provided. Insurance written on a "Claims Made" form is not acceptable without consultation with City of Ocala Risk Management.
- (3) Awarded vendor shall arrange for its liability insurance to include or be endorsed to include a severability of interests/cross-liability provision so that the "City of Ocala" (where named as an additional insured) will be treated as if a separate policy were in existence, but without increasing the policy limits.

EVALUATION PROCESS AND CRITERIA. The City desires to maximize the purchasing value of public funds. It is the intention of the City to award the contract to the most qualified, responsive, responsible firm, which may not necessarily be the lowest-price proposer. Best value evaluation determines the value of products and/or services acquired resulting in the best combinations of quality, service, time, safety, security, and cost considerations over the useful life of the product or service. The emphasis shall be qualifications and value over price.

- (a) **SELECTION COMMITTEE.** The Selection Committee for this Solicitation will be comprised of a minimum of three (3) members, from various and appropriate City departments.
- (b) **ADMINISTRATIVE REVIEW OF PROPOSALS.** Procurement and Contracting staff shall first review all Proposals in detail to make a determination as to the responsiveness of each Proposer:
 - (1) A proposal will be deemed responsive where it complies with the requirements as set forth in this solicitation, including the submission of all required documentation in the format outlined by this Solicitation.
 - (2) If a proposal is found to be inadequate with regard to any of the requirements set forth in this solicitation, the City's Procurement and Contracting Officer, in his/her sole discretion, shall make a determination as to whether or not the deficiency can fairly be corrected or if the Proposal should be rejected and found to be non-responsive.
 - (3) If a proposer fails to meet and provide documentation in support of each of the Minimum Qualifications requirements set forth in this Solicitation, the Proposer's proposal will be rejected and removed from consideration.
 - (4) Only responsive proposals from responsible Proposers shall be submitted to the Auditor Selection Committee

SELECTION COMMITTEE REVIEW AND EVALUATION CRITERIA. Responsive and timely received proposals from responsible firms will be evaluated by the Selection Committee on a fair and consistent basis according to the evaluation criteria set forth below. If oral interviews and presentations are determined to be necessary, final scoring will be conducted after the interviews.

- (5) The Selection Committee shall review each proposal individually and score each proposal based on the evaluation criteria stated herein.
- (6) During the formal Selection Committee meeting, Committee members will discuss the proposals and compile individual rankings for each proposal based on the evaluation criteria stated herein to determine a shortlist consisting of not less than three (3) of the highest-ranking firms. If fewer than three firms respond to the RFP or are otherwise found to be qualified, the Selection Committee members shall shortlist such firms as it deems to be most highly qualified. The Selection Committee meeting shall be formally noticed by e-notification and posting on the City of Ocala website.
- (7) The Selection Committee may schedule oral presentations from the top-ranked firms, and may, at their discretion, obtain guidance from third-party subject matter experts. Dates will be set for conducting interviews or presentations with shortlisted firms, and notification will be sent by e-mail and/or telephone of their assigned date and time, by Procurement staff.

- (8) Final recommendation will be decided based on a review of scores and a consensus of the Selection Committee.
- (9) The City reserves the right to withdraw this Solicitation and reject any or all proposers at any time and for any reason, and to issue such clarifications, modifications, and/or amendments as it may deem appropriate.

NEGOTIATION AND INTENT TO AWARD. After the shortlisted firms have been ranked based upon evaluation criteria, the City will issue its Intent to Award and engage in negotiations for the development of a professional services contract starting with the highest-ranked Proposer after the conclusion of the protest period. In the event that City is unable to negotiate a contract with the highest-ranked Proposer, such negotiations will be terminated, and negotiations will commence with the next highest-ranked Proposer, and so forth, until a contract is negotiated, or the City rejects all Proposals and terminates the solicitation.

- (10) Negotiation meetings will be conducted in Ocala, Florida and the City will distribute instructions and/or agendas in advance of each negotiation session. Representatives for the Proposer should plan to be available, without interruptions, for the entirety of the scheduled negotiation meeting.
- (11) Negotiations will not be open to the public, but will be recorded pursuant to Section 286.0113, Florida Statutes. The recorded sessions and any records presented at the meeting will remain exempt from Florida Public Records until such times as the City provides notice of an intended decision or until thirty (30) days after the final reply, whichever occurs first. Provided, however, if the information provided at the meeting is deemed to be material to the Solicitation, then an addendum will be issued to all responders.
- (12) After the successful negotiation of a professional services contract, the City will present the resulting contract to City Council for approval. City Council may approve the recommended award and negotiated contract or reject the award and contract. The decision of City Council shall be final.

CONTRACT AWARD.

- (a) City anticipates award to the firm who submits a Proposal judged by the Auditor Selection Committee to be the most advantageous to the City.
- (b) Proposer understands that by submitting a response to a solicitation does not constitute an agreement or a contract with the City.
- (c) In the event of a default by the awarded vendor, City reserves the right to utilize the next highest ranked Proposer meeting specifications as the new awarded Vendor. In the event of this occurrence, the next highest ranked Proposer meeting specifications shall be required to provide the goods or services at the prices as contained on their Proposal or bid for this specification.
- (d) The contract that the City expects to award as a result of this Solicitation will be based upon the Solicitation documents, Vendor's final response to the Solicitation as accepted by the City, and the City of Ocala's General Terms and Conditions and any Special Terms and Conditions attached to the advertised Solicitation.