

SOURCE EVALUATION MEMORANDUM

Special Events Promoter
RFP 201443
City of Winchester, Virginia

1. Introduction

The City of Winchester ("City") issued a formal Request For Proposal (RFP) for qualified firms to provide labor, materials, equipment, transportation and quality control and management for promoting and producing special events and related services including promoting the Old Town Winchester brand. The City budget for Old Town Winchester events is \$202,000.00. Included in the budget are all expenses for Old Town events including the cost for hiring an events promoter.

The City of Winchester Old Town Development Board (OTDB) led seven public meetings to gather stakeholder feedback and recommendations for a Special Event Promoter RFP. The OTDB developed a series of recommendations of goals and tasks to be included in the RFP. A draft RFP, including the OTDB recommendations and goals, was developed. From February 9 through 22, 2016, the draft RFP was posted on the City of Winchester's website for public comment and suggestions. No comments were received.

The City issued the final RFP for a Special Events Promoter, RFP 201443 on March 8, 2016. On April 8, 2016 the local newspaper, the Winchester Star, ran an article highlighting that the City was soliciting bids for a Special Event Promoter. The purpose of the RFP was to solicit proposals from firms to provide labor, materials, equipment, transportation, quality control and management for promoting and producing special events and related services for the City of Winchester. The RFP contained a detailed Scope of Work ("SOW"), which outlined the services deemed necessary and essential to the City for this procurement.

The consulting services detailed in this section (scope of services) are to be performed for the City of Winchester on a contractual basis to meet the following criteria:

- *General(requirements)*
- *Goals and Objectives*
- *Minimum service expectation*
- *Contractor and employee qualifications*
- *Quality of events and work*
- *Contract Administration*
- *Additional Services (task orders)*

Offerors were instructed to submit proposals in the following format: One (1) original electronic copy on CD or flash drive in .pdf format and six (6) hardcopies to be submitted in a sealed envelope. The original contract term shall be one (1) year from date of award. The City reserves the right to cancel and terminate this contract, without penalty, upon ten (10) days written notice to contractor. This contract may be renewed for four (4), twelve (12) month periods.

On Monday, April 4, 2016, the City received two (2) proposals in response to the RFP from the following two (2) firms ("Offerors"):

- Experiential Designs, LLC;
- USA Sports & Marketing Services

The proposals were initially examined for administrative compliance with the RFP submittal instructions. No administrative compliance issues were noted.

2. **Evaluation**

Submitted proposals were evaluated by individuals selected by the City Manager ("Evaluation Committee"). The Evaluation Committee was as follows:

- City Staff:
 - Mary Blowe, City of Winchester, CFO and Director of Support Services
 - Jennifer Bell, City of Winchester, Downtown Manager
 - Justin Kerns, Winchester-Frederick County CVB, Executive Director
 - Michael Marzullo, City of Winchester Purchasing Agent (process compliance)
- Downtown Development Board Representative:
 - Scott Dawson, OTDB chair, city resident
- Downtown business community representatives:
 - Ryan Hall, Old Town Winchester Business Association (OTWBA) President, Marketing Director for the Shenandoah Valley Discovery Museum
 - Marilyn Finnemore, (former) OTDB member and business owner Bright Center

Each Evaluation Committee member was issued a copy of each Offeror's proposal and an evaluation score sheet. The written proposals were evaluated based on the criteria set forth in Section E (evaluation criteria) of the RFP, listed below:

- Fundraising Ability- 25 points
- Promotional experience- 20 points

- Qualifications and experience of the firm in performing requested event management services- 30 points
- Experience involving volunteers and partners in events- 5 points
- Price (to be scored by Purchasing Agent) – 20 points

Following evaluations by individual evaluation committee members, a list of questions were compiled to be addressed by offerors during the interview process.

On May 9, 2016, the Evaluation Committee determined that both of the submitted proposals had a reasonable expectation of receiving an award and therefore were moved forward for further consideration and both firms were invited to formal interviews. Compensation requirements were requested from each firm.

3. **Formal Interviews**

On May 24, 2016 the Evaluation Committee conducted formal interviews to provide the selected Offerors an opportunity to: (a) make a formal presentation of the Offeror's proposal; (b) demonstrate the Offeror's understanding of RFP project requirements; (c) explain the Offeror's approach and methods of meeting RFP project requirements; and (d) respond to any questions or requests for clarification by representatives of the Evaluation Committee.

Each member of the selection committee individually evaluated each firm considering their findings from the interviews while employing the evaluation criteria outlined in the RFP.

4. **Analyses**

The evaluation panel completed their evaluations and reported their findings on May 25, 2016. The Purchasing Agent developed a composite ranking of each firm based on the cumulative scores, which determined the committee's recommendation. The composite scores are listed below.

Offeror	Qualification (30 points)	Promotional Experience (20 points)	Pricing (20 points)	Fundraising Ability (25 points)	Experience with volunteers and partners (5 points)	Total (100)
Experiential Designs, LLC	17	12	20	11	3	63
USA Sports & Marketing Services	25	15	19	23	4	86

Experiential Designs, LLC's proposal and interview did not demonstrate the firm's experience with projects of similar scope and services to the RFP requirements. While the Offeror has experience assisting and cooperating with local businesses, they indicated that they did not have experience with events involving alcohol or ticketed band events. Examples of events involving Experiential Designs were heavily focused on Halloween or a horror theme.

From September 11 through October 31, 2016, Experiential Designs was the primary coordinator for Ashland's October Spooktacular. The firm created and implemented several events including Ashland Monster Walk and What's Hiding in Your Attic? and the Ashland Haunted History Tour, which was attended by over 200 people. Promotional expenses were paid for by sponsorships of local businesses, no amount was listed in the proposal. Experiential Designs was hired, in August 2015, to create a set for the 80's, Virginia horror icon, The Bowman Body. Experiential Designs was contracted by Virginia Motorsports Park to design and direct an outdoor haunted attraction. The firm did assist in procuring \$25,000 in sponsorships; however, the amount that the Offeror raised was not listed or conveyed at the interview.

For the above stated reasons, evaluators lacked evidence necessary to be confident in the firm's ability to provide the services required under this RFP. The Offeror's proposed Cost/Price is \$80,000.00 annually.

USA Sports & Marketing Services' proposal presented evidence of the firm's ability to provide the scope of services required under this RFP. The proposal and interview demonstrated the qualifications and experience of the firm in performing requested event management services by listing, in their bid, examples of specific events previously conducted entirely by USA Sports & Marketing Services for each line item. Events coordinated ranged from small events for less than 200 people to events for over 2,000 people. Their experience ranged from events for children to events involving ticket sales, bands and a beer and wine gardens.

The offeror also demonstrated fundraising ability by providing an example of an actual event budget for a past event (Kidzfest). The budget noted revenue sources: from vendor fees, sponsorship and ads as well as the value of in-kind media coverage. USA Sports & Marketing Services listed fundraising experience from 2013, 2014 and 2015 all exceeding \$90,000.

The Offeror's proposed Cost/Price is \$80,232 annually, with a proposed, but not binding, 3 percent renewal increase.

5. **Recommendation**

Using the evaluation procedure described in this memorandum and the evaluation criteria of the RFP 201443, the Evaluation Committee submits the following recommendation:

- Award **USA Sports & Marketing Services** a contract to provide Special Event Services for the City of Winchester.