

**REQUEST FOR PROPOSAL**

**RFP 09\_25\_26**

**EVENT MANAGEMENT SERVICES**

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NOTE: The Table of Contents shall be included as part of the bid, and Attachments A through F shall be incorporated into the RFP packet.

Josephine Dy-Liacco  
Manager, Purchasing Services

## SCHEDULE OF EVENTS

### RFP 09\_25\_26

#### EVENT MANAGEMENT SERVICES

RFP Issuance	Wednesday, April 15, 2026
Publication Dates	Wednesday, April 15, 2026 Wednesday, April 22, 2026
Pre-Bid Conference	Wednesday, April 29, 2026
Last Day to Submit Questions	Wednesday, May 6, 2026
Addendum for Answers to Questions	Wednesday, May 13, 2026
Sealed RFP Due to the SCCOE	Wednesday, May 20, 2026
RFP Evaluation (Internal)	Monday, May 18, 2026
Notice for Interviews	Wednesday, May 20, 2026
RFP Interviews (Top 3 based on Evaluation)	Friday, May 22, 2026
Award Notification (Purchasing)	Wednesday, May 27, 2026
Fully Executed Contract	TBA
Contract Start	July 1, 2026

**SANTA CLARA COUNTY OFFICE OF EDUCATION  
1290 RIDDER PARK DRIVE, SAN JOSE CA 95131**

**NOTICE TO BIDDERS – REQUEST FOR PROPOSALS**

**RFP 09\_25\_26 – EVENT MANAGEMENT SYSTEMS**

The Santa Clara County Office of Education (SCCOE) hereby invites qualified vendors to submit a Request for Proposals (RFPs) to be received by the Purchasing Services Department at:

1290 Ridder Park Drive, MC 254  
San Jose, California 95131-2304

**Deadline for Submission: Wednesday, May 20, 2026 at 3:00 PM (PST)**

Please note that there will be no formal public opening of the proposals. All submissions will be evaluated based on pricing, compliance with specifications, and other relevant criteria, and may result in single or multiple awards.

Proposals that are incomplete or noncompliant with the requirements outlined in the RFP package are subject to rejection. All bidders are responsible for reviewing and adhering to the full instructions provided in the proposal documentation.

It is the sole responsibility of each bidder to ensure that proposals are delivered to the address above by the specified deadline. Proposals submitted via email or facsimile (FAX) will not be accepted. SCCOE is not liable for delays in delivery by the U.S. Postal Service or any other carrier.

The Santa Clara County Office of Education (SCCOE) reserves the right to accept or reject all proposals, and to waive any irregularities or informalities in the RFP or the proposal process. No proposal, in whole or in part, may be withdrawn for a period of sixty (60) calendar days following the RFP submission deadline.

Contact Information:

General Information  
Josephine Dy-Liacco  
Manager  
Purchasing Services  
Ph.: (408) 453-6858  
[jdyliaacco@sccoe.org](mailto:jdyliaacco@sccoe.org)

Technical Questions  
Annie Ho  
Senior Executive Assistant  
Business Administration  
Ph.: (408) 453-6932  
[anho@sccoe.org](mailto:anho@sccoe.org)

All **inquiries** regarding this RFP must be submitted in writing, no later than **3:00 PM on Wednesday, May 6, 2026**, to Josephine Dy-Liacco at [jdy-liacco@sccoe.org](mailto:jdy-liacco@sccoe.org). Responses to questions will be shared with all known prospective respondents to ensure equal access to information via an **addendum** to be published on **Wednesday, May 13, 2026**. Any addenda or updates will be posted on the SCCOE website at: <http://www.sccoe.org/depts/bizserv/purchasing/Pages/Proposals-Posting-System.aspx>. It is the responsibility of all prospective respondents to **monitor the website** regularly for any amendments or addenda.

The Santa Clara County Office of Education (SCCOE) reserves the right to amend the RFP as necessary.

County Superintendent of Schools  
Santa Clara County Office of Education

By: Josephine Dy-Liacco  
Manager, Purchasing Services

1<sup>st</sup> Advertisement: April 15, 2026  
2<sup>nd</sup> Advertisement: April 22, 2026

## **SECTION 1 INTRODUCTION**

The Santa Clara County Office of Education (SCCOE) provides leadership, services, and support to school districts, educators, students, and the community throughout Santa Clara County, California. As a Class II intermediate unit serving 32 K–12 districts and four community college districts, SCCOE partners with local districts to enhance educational programs, ensure compliance with state and federal requirements, and promote equitable access to high-quality learning opportunities.

Through innovative initiatives and specialized programs, the SCCOE supports students with diverse needs, including those in special education, early learning, alternative education, migrant education, and career technical education. The Office also offers direct instructional programs and a broad range of support services in instruction, business, and personnel, enhancing districts' capacity to deliver quality education and aligning with California Department of Education requirements.

The SCCOE is organized into six major units: Business, Facilities & Operations, Educational Services, Executive Services, Instruction, Leadership and Innovation, Human Resources and Technology & Data Services, all working collaboratively to support districts, educators, and students across the county.

## **SECTION 2 SCOPE OF WORK**

The selected vendor will provide an Event Management System that meets the following functional and technical requirements:

### **1. Event Setup & Customization**

- Ability to create event websites with customizable templates, branding options, and custom domains.
- Drag-and-drop builders and modular configuration with easy on/off toggles for features.
- Mobile-optimized event pages (including options that do not require app downloads).
- Widgets and iFrame integration for embedding schedules and content on existing websites.

### **2. Registration & Forms**

- Support for multiple registration types (attendees, speakers, exhibitors).
- Customizable forms with password protection, discount codes, and pre-approved lists.
- Application workflows for speakers/presenters, including self-service portals for profile and session updates.
- Waitlist automation and QR code check-in (including per-session).
- Badge printing options (in-house or via managed services).

### **3. Attendee Engagement**

- Intuitive attendee interface with customizable schedules.
- Virtual session capabilities, surveys, and gamification features.
- Email and campaign tools with templates and custom content options.

#### 4. **Payment Processing & Financial Management**

- Integration with multiple payment gateways; preference for compatibility with our current processor (e.g., CyberSource).
- Transparent fee structures (flat fees, per-ticket fees, or annual licensing).
- PCI compliance and in-system initiation of payments and refunds.
- Comprehensive sales and revenue reporting.

#### 5. **Roles & Permissions**

- Multi-tiered access profiles (e.g., Super Admin vs. Event Admin) with granular permissions.
- Ability to segment accounts or teams within an umbrella organization.
- Clear details on admin seat limits versus unlimited admin options.

#### 6. **Integration & Data**

- Calendar widgets and external program integrations.
- Ability to embed schedule components into existing websites.
- Analytics and reporting for attendance, engagement, and financials.
- Localization for date formats and regional settings.

#### 7. **Pricing & Licensing**

- Transparent pricing models: annual licenses, attendee-based pricing, or flat commission per ticket.
- Options for unlimited events and tiered pricing for small events.
- Discounts for non-profit organizations.
- Clear details on included admin users, license caps, and mobile app access/fees.

#### 8. **Training & Support**

- Comprehensive onboarding and live training sessions.
- Ongoing support and troubleshooting.
- Access to sandbox/trial environments for evaluation.
- Migration plan for transitioning current users from our existing platform.

In 2025, SCCOE hosted a total of 358 events. Of these, 24 were paid events, and only 18 utilized full end-to-end event management support. Approximately 289 events required minimal to basic features, while about 51 events fell into the mid-range category, leveraging most event management capabilities. This distribution underscores the need for a flexible platform that can scale from simple to complex event requirements without overwhelming users.

## **Anticipated Schedule and Implementation Planning**

To support transition planning and staff training, the SCCOE may, at its discretion, engage in preliminary planning activities by May 2026. Any such activities are for planning purposes only and do not constitute a commitment, selection, or intent to award a contract. No vendor shall commence work or incur costs prior to the execution of a fully executed contract authorized by the SCCOE.

Vendors should be prepared to support the anticipated evaluation timeline and, if awarded, participate in implementation and training activities in accordance with the contract schedule.

### **SECTION 3 PROVIDER DUTIES**

The selected provider must demonstrate the ability to deliver a secure, reliable, and scalable Event Management System that meets the functional and technical requirements outlined in this RFP. In addition, the provider should:

- 1. Experience and Expertise**
  - Proven experience implementing event management solutions for government, education, or public-sector organizations.
  - Provide examples of similar projects, including references from clients with comparable compliance and reporting needs.
  
- 2. Compliance and Security**
  - Ensure the platform is PCI compliant and adheres to all applicable data privacy and security standards.
  - Provide documentation on security protocols, data encryption, and user access controls.
  - Comply with financial regulations and reporting requirements applicable to government and educational institutions, including:
    - Support for audit-ready financial reporting.
    - Ability to generate transaction logs and reconciliation reports for internal and external audits.
    - Integration with approved payment gateways that meet public-sector compliance standards.
  
- 3. Training and Support**
  - Offer comprehensive onboarding, including live training sessions for administrators.
  - Provide ongoing technical support, including response times and escalation procedures.
  - Include access to documentation, tutorials, and knowledge base resources.
  
- 4. Implementation and Migration**
  - Deliver a clear implementation plan, including timelines, milestones, and resource requirements.
  - Provide a migration strategy for transitioning existing events and users from our current platform.
  
- 5. Service Level Commitments**
  - Define uptime guarantees, maintenance schedules, and disaster recovery protocols.
  - Outline customer service availability (hours, channels, and response times).

#### 6. Trial and Evaluation

- Offer access to a sandbox or trial environment for SCCOE to evaluate the platform prior to full deployment.

### SECTION 4 PROPOSAL SUBMISSION REQUIREMENTS

The SCCOE requests that all bidders submit **three (3) hard copies** of their proposal. Proposals must be delivered **in sealed envelopes, clearly** marked with the following information:

- Bidder's Name
- Bidder's Address
- Project Name for which the proposal is being submitted –  
**RFP 09\_25\_26 EVENT MANAGEMENT SERVICES**

It is the sole responsibility of the bidder to ensure that the proposal is received by the designated deadline. Late submissions will not be accepted and will be returned to the bidder unopened.

Responses to this RFP will be reviewed internally, and there will be no public bid opening.

#### PROPOSAL AND CONTRACT ELIGIBILITY

No proposal will be accepted from, nor will a contract be awarded to, any individual or firm that:

- is in arrears to the Santa Clara County Office of Education; or
- has been in default as a surety, contractor, or otherwise within the past twelve (12) months.

#### SIGNING OF PROPOSALS

All proposals must be signed in long-hand by an individual duly authorized to bind the bidder to a contract. The full legal name of the bidding entity must be clearly stated in the proposal. By signing the proposal, the bidder acknowledges and agrees to fulfill all obligations outlined therein.

#### ALTERATION OR VARIATION OF TERMS

It is mutually understood and agreed that no alteration or variation of the terms of this proposal or any resulting purchase order shall be valid unless made in writing and signed by both parties.

No oral agreements or understandings not expressly incorporated into this document shall be binding. Any modifications or amendments must be confirmed in writing and executed by the authorized representatives of both parties to be enforceable.

#### ASSIGNABILITY

The contract shall not be assignable by the Consultant, either in whole or in part, without the prior written consent of the other party. This contract shall be binding upon and shall incur to the benefit of the respective parties, as well as their heirs, executors, administrators, successors, and authorized assignees.

## **COMPLIANCE WITH STATUTE**

The Consultant hereby warrants and represents that all applicable Federal and State statutes, regulations, and local ordinances will be fully complied with in the delivery of the services provided under this agreement.

## **PRICE, TERMS AND CONDITIONS**

The price, terms, and conditions outlined in this proposal shall remain valid for sixty (60) days from the date of the proposal opening, unless the party provides written confirmation allowing for a longer period.

## **MODIFICATIONS**

Any changes, additions, or alterations to the Proposal Form—including alternative proposals, recapitulations of the work bid upon, or any other modifications not explicitly requested in the contract documents—may result in the rejection of the proposal as non-responsive.

No oral or telephonic modifications will be considered. Telegraphic modifications will only be considered if evidence shows that written confirmation, signed by the bidder, was mailed prior to the proposal opening.

## **ERASURES**

All proposals must be free of erasures, interlineations, or other corrections unless each correction is properly authenticated. To properly authenticate a correction, the initials of the individual signing the proposal must be affixed in the margin immediately adjacent to the correction.

## **WITHDRAWAL OF PROPOSALS**

Bidders may withdraw their proposal at any time prior to the scheduled closing time for receipt of proposals. Withdrawals may be made in person, by written request, or by telegraphic request, provided that the telegraphic request is confirmed as specified above.

## **EVIDENCE OF RESPONSIBILITY**

Upon request by the **Santa Clara County Office of Education (SCCOE)**, a bidder whose proposal is under consideration for the award may be required to submit, promptly and to the satisfaction of the SCCOE, evidence demonstrating the bidder's:

- Professional licenses or certificates
- Financial resources
- Experience
- Organizational capacity to perform the contract

## **LISTING SUBCONTRACTORS**

Each bidder must disclose any subcontractors, partners, or third-party vendors proposed to perform work for this project, including system implementation, integration, training, or support. All such parties must be identified in the proposal, along with a description of their role and qualifications.

The SCCOE reserves the right to review and approve any subcontractors or third-party partners prior to contract execution. Failure to disclose any subcontracted work may result in rejection of the proposal or termination of the contract.

## **INDEMNIFICATION**

As part of each and every agreement arising out of this RFP, the successful vendor shall agree to indemnify, defend, and hold SCCOE and the LEAs harmless from any and all liabilities including, but not limited to, litigation costs and attorney's fees which it may incur as a consequence of the agreements and from any and all claims and losses to anyone who may be injured or damaged by reason of the vendor's willful misconduct or negligent performance of the agreements.

## **INSURANCE**

Without in anyway limiting the selected vendor's liability pursuant to the "Indemnification" section of the contract, the selected vendor, at its sole expense, shall self-insure or maintain the following insurance from insurers with an AM Best rating of A-VII of higher.

Each insurance policy required by this section shall be endorsed to state that coverage shall not be suspended, voided, canceled, or reduced in limits except after thirty (30) days prior written notice has been given to SCCOE. The selected vendor shall furnish SCCOE with certificate(s), additional insured endorsement(s), and waiver(s) of subrogation evidencing compliance with the insurance requirements for review and approval at the time of signing the contract. The certificates shall clearly indicate that the selected vendor has obtained insurance of the type, amount and classification required by these provisions, in excess of any pending claims at the time of execution of the contract.

If the selected vendor maintains broader coverage and/or higher limits than the specified minimums shown below, SCCOE shall be entitled to the broader coverage and/or the higher limits maintained by the selected vendor.

## **REQUIREMENTS**

Commercial General Liability insurance with coverage in an amount not less than two million dollars (\$2,000,000) per occurrence and four million dollars (\$4,000,000) aggregate for bodily injury, personal injury, and property damage, including contractual liability.

**Each and every General Liability policy and endorsement shall include the following:**

- Name as Additional Insured the Santa Clara County Office of Education, its Board, officers, employees, interns, volunteers, agents and representatives and invitees.
- State that such policy is primary insurance to any other insurance available to the Additional Insured, with respect to any claims arising out of this Agreement and that such policies apply separately to each insured against who claim is made or suit is brought.
- If any policies are written on a claims-made form, CONTRACTOR agrees to maintain such insurance continuously in effect for three years following completion of this Agreement or extend the period for reporting claims for three years following the completion of this

Agreement, such that occurrences which take place during the Agreement period shall be insured for three years following completion of the Agreement.

#### **AUTOMOBILE LIABILITY**

Automobile liability insurance shall include coverage for owned, non-owned, and hired autos, with bodily injury and property damage liability limits not less than one million dollars (\$1,000,000) per accident.

#### **CYBER LIABILITY**

Cyber Liability insurance with required limits of not less than five million dollars (\$5,000,000) per claim. Coverage shall be sufficiently broad to respond to the duties and obligations as undertaken by the selected vendor and shall include, but not be limited to, security breach, system failure, data recovery, business interruption, cyber extortion, social engineering, infringement of intellectual property, including but not limited to infringement of copyright, trademark, trade dress, invasion of privacy violations, information theft, damage to or destruction of electronic information, release of private information, and alteration of electronic information. The policy shall provide coverage for breach response costs, regulatory fines, and penalties as well as credit monitoring expense.

#### **STATUTORY WORKERS' COMPENSATION INSURANCE**

Statutory Workers' Compensation insurance with Employer's Liability limits not less than one million dollars (\$1,000,000) per accident. The selected vendor shall also provide a Waiver of Subrogation for any Workers' Compensation claims or actions for work-related injuries arising out of the selected vendor's performance of the contract.

#### **PROFESSIONAL LIABILITY INSURANCE**

Professional Liability insurance with limits not less than one million dollars (\$1,000,000) each occurrence and two million dollars (\$2,000,000) in the aggregate.

#### **CONTRACT TERM**

The term of this contract shall be from **July 1, 2026, through June 30, 2027**, with the option of **four (4) one-year extensions**, subject to mutual agreement between the parties.

#### **SECTION 5 PROPOSAL RESPONSE REQUIREMENTS**

All proposals must include the following sections presented in the order listed:

1. **Detailed Budget**
  - A comprehensive budget outlining all costs, including hourly fees for services to be provided.
2. **Proposed Timeline / Work Schedule**
  - A detailed schedule for providing services, including intermediary steps, estimated hours for each task, and periodic reports summarizing hours devoted.

**3. Key Personnel**

- A list of all personnel assigned to the project, including resumes. Clearly identify the individual with primary responsibility for initiating and maintaining the required services.

**4. History/Track Record**

- A description of the organization’s history and relevant experience providing similar services, including references from previous clients.

**5. Additional Forms and Assurances**

- All completed and signed forms required for this RFP (Attachments A through E).

**6. Signature**

- The signature of the legal owner or an authorized representative of the firm.

**7. Other Relevant Information**

- Any additional information pertinent to the proposal or evaluation of the response.

**SECTION 6      AWARD PROCESS**

**EVALUATION AND AWARD CRITERIA**

All proposals will be evaluated by a committee to determine the most responsive and responsible vendor(s) whose submission best meets the needs of the Santa Clara County Office of Education (SCCOE). The evaluation process is designed to ensure fairness, transparency, and alignment with the requirements outlined in this RFP.

Selection of a proposal will be based on the following criteria to equal 100 points:

<b>Criteria</b>	<b>Value</b>
Cost Proposal	25 Points
Experience and Track Record	15 Points
Technical Approach/Solution	25 Points
Support and Training	25 Points
Timeline/Work Plan	10 Points

**INTERVIEW SCHEDULE FOR QUALIFYING CONTRACTORS**

All qualifying finalists will be interviewed on Friday, May 22, 2026, between 9:00 a.m. and 12:00 p.m., either via Zoom or in person at the Santa Clara County Office of Education, located at 1290 Ridder Park Drive, San Jose, CA 95131.

Finalists will be notified by Purchasing Services via email by Wednesday, May 27, 2026, and should reserve this date and time on their calendars.

*Please allow additional time upon arrival to check in at the Front Lobby and obtain a temporary visitor badge prior to the interview.*

The interview panel may include, but is not limited to, representatives from SCCOE such as the Director of Public Affairs, Director of Executive Services, Program Managers, Purchasing Supervisor, and other relevant stakeholders.

## **PROPOSAL RESULTS**

The results of the proposal will be available for inspection at Purchasing Services, Santa Clara County Office of Education, located at 1290 Ridder Park Drive, San Jose, California 95131, upon execution of the contract with the successful bidder.

## **SANTA CLARA COUNTY OF EDUCATION RIGHTS AND OPTIONS**

The **Santa Clara County Office of Education (SCCOE)** reserves the right to:

- Postpone the selection process at its discretion.
- Withdraw this Request for Proposals (RFP) at any time.
- Reject any or all proposals without providing a reason for rejection.
- Negotiate with any, all, or none of the respondents to this RFP.

This Request for Proposal (RFP) does not obligate the Santa Clara County Office of Education (SCCOE) to negotiate or enter a contract. Proposals submitted in response to this RFP will not be returned, and no compensation will be provided for any costs incurred in the preparation or submission of proposals.

**REQUEST FOR PROPOSAL**

**RFP 09\_25\_26**

**EVENT MANAGEMENT SERVICES**

**BIDDING QUESTIONNAIRE**

**1. General Information**

1.1 Legal Business Name: \_\_\_\_\_

1.2 DBA Name (if applicable): \_\_\_\_\_

1.3 Business Address: \_\_\_\_\_

1.4 Primary Contact Name and Title: \_\_\_\_\_

1.5 Phone: \_\_\_\_\_ Email: \_\_\_\_\_

1.6 Type of Business Entity (Corporation, LLC, Sole Proprietor, etc.): \_\_\_\_\_

1.7 Federal Employer Identification Number (EIN): \_\_\_\_\_

**2. Legal and Compliance**

2.1 Has your company been **debarred, suspended, or otherwise prohibited** from doing business with any public entity in the last 5 years?

Yes  No

If yes, provide details: \_\_\_\_\_

2.2 Has your company been **subject to any litigation or claims** related to services similar to those described in this RFP in the last 5 years?

Yes  No

If yes, provide details: \_\_\_\_\_

2.3 Does your company carry **workers' compensation insurance** as required by California law?

Yes  No

2.4 Does your company comply with **all applicable non-discrimination laws** in hiring and contracting?

Yes  No

**3. Experience and References**

3.1 How many years has your company provided event management services? \_\_\_\_\_

3.2 On a separate sheet, provide at least **three references** for similar projects in the last 5 years (include organization name, contact name, phone, email, and a brief description of services provided).

3.2 On a separate sheet, describe your company’s experience managing events with multiple vendors, subcontractors, or partners. Include examples of coordination and outcomes.

**4. Financial Stability**

4.1 Has your company filed for bankruptcy or been subject to involuntary bankruptcy proceedings in the past 10 years?

Yes  No

4.2 Provide the name of your bank or financial institution that can verify your company’s ability to manage contracts of this scale.

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**5. Additional Information**

5.1 Provide any additional information that demonstrates your company’s ability to successfully perform the services described in this RFP:

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**Certification**

I certify that the information provided in this questionnaire is true and accurate to the best of my knowledge, and that I have the authority to submit this response on behalf of the company.

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

Signature: \_\_\_\_\_