

TOWN OF ATHERTON



REQUEST FOR PROPOSAL

Event Management Services At Holbrook-Palmer Park

**Site Address:
150 Watkins Avenue Atherton, CA 94027**

**Issued:
February 27, 2024**

**Proposals Due:
May 7, 2024, 2:00 pm**

**Town of Atherton
Office of the City Clerk
80 Fair Oaks Lane
Atherton Ca 94027**

Overview

The Town of Atherton (“Town”) is seeking proposals from qualified companies or individuals that have demonstrated expertise in the management, marketing, rental, scheduling, operation and administration of event facilities.

The selected firm will be required to have qualified individuals that have demonstrated experience in managing event spaces for events such as weddings, wedding receptions, birthday and/or anniversary celebrations, municipal, corporate, social and philanthropic meetings and social events. The total amount of work available will be determined by reservations and use of the facilities, subject to the fees and limitations established by the Town. Both prior event management vendors were facilitated by a contract that provided catering services to clients non-exclusively and/or exclusively as part of the venue management contract. While not required, a service provider model that includes a closely linked catering arm is preferred.

Background

The Town of Atherton, incorporated in 1923, is a small residential community, with approximately 7,000 residents. The Town extends from slightly west of the Bayshore Freeway (US 101) up to I280 and is approximately 4.5 miles long and 1.5 miles wide. Its municipal neighbors include Menlo Park to the south, Woodside to the west and Redwood City to the north.

Holbrook-Palmer Park, the Town’s only recreation site, is a lovely, municipally owned 22 acre garden setting with indoor and outdoor facilities, including a ballfield, tennis courts, playground, gardens and walking paths. Significant structures available for rental include the Main House, Jennings Pavilion, and Carriage House, as shown on Exhibits 1 and 2. The Park is located between Middlefield Road and El Camino Real at 150 Watkins Avenue. It is accessed from Highway 101 via the Marsh Road-Atherton Exit.

The Main House is a classically designed home which consists of a 700 square foot meeting room with a fireplace, two smaller rooms for breakout sessions or small conferences, and a fully equipped kitchen. The Main House can accommodate 65 - 70 in the living room theatre style/ceremony and approximately 50 when set up with round tables for dinner. Approximately 25 people can be accommodated at classroom style tables and chairs. A large porch, wide brick steps and an oak covered patio area are suitable for refreshments or outdoor luncheons.

In 1977 the Jennings Pavilion was constructed at the Park to accommodate larger groups for weddings, receptions, dinners, meetings and lectures. Large windows on all sides create relaxing vistas of the stately trees and rolling green lawns. The room comfortably seats up to 150-theatre style/ceremony and 80-100-classroom style. Dinner for 120-130 is served at round tables. A large kitchen with a commercial sized refrigerator and commercial gas range enables caterers to serve quickly and efficiently. The large adjoining patio is often used for barbecues and cocktail receptions and a walkway connects the building to the Main House and its patio area. Exhibit 2 shows the event facilities to be managed pursuant to this RFP.

The Carriage House provides a point of interest for Park visitors. The Carriage House was built to replace the original barn that was destroyed by fire in 1896. The sturdy wood floors, windowpanes, moldings, and iron grills in the horse stalls have remained the same for over 100 years. The Carriage House is available for classes, dances, meetings, bridge and workshops. It seats 80 for lunch or dinner and 90 for meetings. The Meadow and Patio areas can be reserved with the building for outdoor events.

The Town has completed a major renovation of the entry area to the park which includes new pedestrian facilities at the entry and exit of the park, new circulation pathways, added landscaping and parking area improvements. Upcoming projects include renovation of the playgrounds and other minor facility enhancements.

The successful proposer will be responsible for the day-to-day management, marketing, renting, scheduling, set up, and cleanup of the rental facilities, as well as other event management and coordination services.

Part A – Background Information and Service Requirements

I. Background

Prior to September 2011, Town staff managed facility rentals and support including showing of facilities, bookings, processing payments (including deposits and returns), deliveries, set ups, oversight and tear downs of events. Starting September 2011, the Town contracted with private vendors for event management services for event management services including showing of facilities, bookings, deliveries, set ups, oversight and tear downs of events. Some of the vendors also operated catering businesses and were able to offer this service to events clients.

In August 2020, after approximately 6 ½ years of managing event services at Holbrook-Palmer Park, the Town's vendor provided their notice that they were closing permanently and would no longer be able to provide Event Management Services to the Town. Following the notice, the Town has contracted with a former employee of the Town's vendor to schedule tours, bookings of event facilities, and to manage events as the Town sought a new vendor.

In July 2021 the Town Awarded a contract to Catered Too, Inc., for event management services at Holbrook-Palmer Park. Catered Too had an onsite presence two (2) days per week, was responsible for marketing, scheduling tours (within no more than 48 hours of request), booking, confirming and managing reservations of park facilities, staffing events including set up and cleanup of all events. Catered Too provided notice to the Town that they would not be able to support event management services at Holbrook Palmer Park beyond December 2023.

Payment for event management services had typically been based on a percentage of facility rental revenues. Most recently, event management services were paid via catering services – exclusive catering for large events (>50). The Town is open to a variety of revenue share models.

Exhibit 3 lists example events from past bookings. A table of recent revenues is shown below.

	FY 2018-19 (full rental)	FY 2019-20 (pre-COVID)	FY 2020-21 (full COVID)	FY 2021-22 (return to service)	FY 2022-23 (return to service)
Social/Meetings	\$114,952	\$92,903	\$15,059	\$89,025	\$85,487
Weddings	\$29,487	\$30,500	\$19,573	\$19,499	\$22,186
Classes	\$19,995	\$20,166		\$7,260	\$8,278
Total	\$164,434	\$143,569	\$34,632	\$115,783	\$115,951

Various rules, regulations and policies have been established and additional rules may be developed to regulate events services. These include compliance with all local ordinances – to include the Town’s Noise Ordinance. Fees for service are shown on Exhibit 4. Contractors will be permitted to suggest additional rules, regulations, and procedures, which shall be subject to approval or rejection by the City Manager or his designee. Among the rules approved by City Council are the following:

1. A rental application stating event type, size and duration must be submitted in order to reserve facilities and will require approval by the City Manager or designee.
2. Only one wedding will be permitted per day, and the number of guests shall be limited to two hundred (200).
3. Events must comply with the Town’s noise ordinance.
4. The City Manager may approve event size in excess of 200 persons.*
5. Insurance coverage for all events as recommended to the Town by PLAN JPA shall be required.
6. The Park will be available every day of the year.
7. Renters shall agree to provide other services, such as private security, valet parking, etc. as required.

II. Scope of Services

The successful proposer will enter into a services agreement with the Town of Atherton to manage events and event facilities at Holbrook-Palmer Park

The selected firm will be required to provide the Town with all labor, vehicles and equipment, and materials as necessary to satisfactorily perform the entire events management functions under this agreement. The Town of Atherton desires that the provision of Event Services is performed to generate revenue for the operations, maintenance and improvement of the Park without negatively impacting other Park users and Park neighbors. The Town desires that its contractor operate effectively and efficiently while performing services. The contractor is encouraged to provide exemplary services to the Town and to its Park users.

The selected firm must have the resources and abilities to market, advertise, plan, schedule, manage, operate, and conduct events, including unpaid events approved by Town staff, in

Holbrook-Palmer Park. The scope of services may include, but will not be limited to the following:

- a. Development of administration and coordination policies, procedures, calendars and materials to demonstrate competence in managing and operating Event Services, within 20 days of Notice to Proceed;
- b. Preparing scheduling, operations and financial records and reports that conform to requirements under Section III, Records and Reports;
- c. Developing and distributing promotional material for the facilities;
- d. Developing and placing advertisements in appropriate print and online media;
- e. Though various functions can be conducted remotely via email, phone text and other approaches, presence by the Event Manager in the Park office at least 2 days per week between the hours of 9 am and 5 pm as needed;
- f. Responding to clients within no more than 24 hours of contact;
- g. Showing facilities to prospective clients within no more than 72 hours of request;
- h. Booking, scheduling and staffing events, including Town-sponsored non-revenue generating (no-fee) meetings and events up to fifteen (15) hours per month;
- i. Completing & submitting the Town's facility rental permit application with all corresponding documentation and fees in a timely manner;
- j. Follow the Town's master fee schedule for all fees;
- k. Adhere to the Town's guidelines and procedures for accepting and processing payments for event rentals;
- l. Compliance with Town Ordinances and policies for events including noise, parking and park usage.
- m. Maintaining the Events Facilities and equipment (see Exhibit 5) in a safe, clean and attractive condition in accord with high standards expected by the Town and by Event Facility users;
- n. Setting up Events Facilities for events;
- o. Cleaning up Events Facilities following events;
- p. Promptly informing Town's Contract Manager of maintenance and repair needs;
- q. Recommending capital improvements to Town's Contract Manager of Events Facilities to maintain them and to enhance their ability to enhance revenues;
- r. Coordinating provision of goods and services such as rentals, flowers, catering, music, photography and/or videography, security, clean-up and disposal; and
- s. The Contractor may provide catering and/or other services but will not be permitted to be the exclusive provider of these services unless explicitly stated in the agreement as part of the compensation package.

III. Records and Reports

Scheduling Records

- (a) Contractor shall record all bookings and tentative reservations in the Town's electronic calendar so they can be viewed by Town Staff and coordinate with other planned Town activities.
- (b) Contractor shall maintain a calendar showing all events scheduled at Park during the term of this contract and for at least 24 months beyond the end of the term. The scheduling record shall be maintained in a complete and accurate manner and shall be made available to Town at all times. A copy in print, or in an electronic format acceptable to Town,

shall be provided within 5 business days of the end of each month. Records and reports must be submitted with the Contractor's monthly invoice.

Monthly Activity Report

A monthly activity report in print, or in an electronic format acceptable to Town, shall be provided within 5 business days of the end of each month. The report shall include the following:

- a) list of all events managed by the Contractor at the Park (a list of typical events is shown in Exhibit 3);
- b) list of employees and subcontractors providing services pursuant to this agreement
- c) an income statement for Park events management services;
- d) a log of any warnings, citations, violations received from any governmental agency pursuant to services provided in this agreement;
- e) a log of written complaints received from clients and all other stakeholders, i.e. neighbors, vendors, employees and subcontractors.

IV. Maintenance of Facilities and Equipment

The contractor shall be responsible for set-up, operations and event clean-up of the interior of the Main House, Carriage House and Jennings Pavilion, and for janitorial service of Jennings Pavilion. The contractor will also be responsible for set-up, takedown, cleaning and storage of tables, chairs, furniture, and all other equipment provided by the Town (see Exhibit 5). The contractor will also be responsible for cleaning outdoor areas used during events, returning them to their pre-event status. A drawing showing areas of contractor responsibility is contained in Exhibit 2. The Contractor shall be responsible for maintaining the building interiors in a neat, clean and presentable condition.

The Town of Atherton will be responsible for making interior repairs and improvements and for maintaining, repairing and improving building exteriors and grounds, excluding set-up, operating and cleaning of premises used for events activities. The Town's janitorial contractor will perform scheduled service for the Main and Carriage Houses.

The contractor may choose to offer enhanced outdoor garden areas surrounding the facilities and patios including sculptures, potted plants, annual flower gardens or other high maintenance features. These features will be kept up by the contractor and returned to their original look upon ending of this contract if requested by the Town.

V. Contract Term

The Town intends to award a services contract with an initial term of up to three (3) years, renewable at the option of the Town for up to three additional one (1) year terms. The total term of the proposed contract may extend for six (6) years from award by the Town. The exercise of any additional extension of term shall be at the sole discretion of the Town. Town may consider alternate agreement term lengths within written proposals.

VI. Compensation

Compensation for event management services has varied from being a percentage of the rental fee (not including the Town's administrative charges) to vendor compensation being solely via catering revenues generated, with a percentage of catering revenues returned to the Town. The

Town is open to various models of vendor compensation. The Town will pay the Contractor invoice monthly.

In recognition of the investment and operations by the Contractor, as well as services for no-fee groups, the Town will guarantee a minimum monthly payment to Contractor of \$3,000 for the first three (3) months of the contract. Contractor shall provide set-up, take-down and clean-up services for no-fee groups as shown in Exhibit 3 for up to fifteen (15) hours per month, without charge to the Town or groups.

The Town reserves the right to negotiate with the selected firm on the rates and fees as submitted in the Bid and for each **renewal** period.

VII. Rental Fees

Rental fees are reviewed and are adjusted periodically in collaboration with the event management vendor based on market demand.

PART B - Proposal Content

The proposal should describe the methodology to be used to accomplish each of the tasks and services expected as defined in the Scope of Work. The proposal should also describe the work that shall be necessary to satisfactorily complete the tasks and service requirements.

Please note that this Request for Proposals cannot identify each specific, individual task required to successfully and completely implement this service. The Town of Atherton relies on the professionalism and competence of the bidder to be knowledgeable of the general areas identified in the Scope of Work and of adequate competence to include in its proposal all required tasks and subtasks, personnel commitments, man hours, direct and indirect costs, etc. The Town of Atherton will not approve addenda to the selected contractor's agreement which do not involve a substantial change from the general Scope of Work identified in this Request for Proposals.

The proposal should include the following:

1. **TRANSMITTAL LETTER AND EXPERIENCE:** Introduce your organization, its size, background and provide information to demonstrate your organization's skill and experience in the performance of event services and venue management. Proposer must currently operate or have a minimum of 3+ years of experience providing event management services and venue operations and management. The cover letter shall be signed by an officer of the organization who is authorized to negotiate a contract with the Town.

The experience shall be set forth and submitted, as follows:

- a. Ownership; if incorporated, the state in which the selected firm is incorporated and the date of incorporation;
- b. Location of contractor's office;
- c. Number of employees at location which will provide services to the Park, and total of all employees;

- d. Name, address, email address, and telephone number of the contractor's point of contact;
 - e. Contractor background/history;
 - f. Contractor qualifications to provide the services described in this RFP;
 - g. Length of time the contractor has been providing services described in this RFP;
 - h. A complete disclosure of any alleged significant prior or on-going contract failure, any civil or criminal litigation or investigation pending which involves the contractor and/or contractor employees proposed or assigned to this contract or in which the contractor has been judged guilty or liable within the last 5 years. If there is no negative history to disclose, state that in the Bid.
2. **KEY PERSONNEL AND QUALIFICATIONS:** Identify the Principal-in-Charge and provide a brief resume for each of the key persons proposed to work on this project. Any key subconsultants proposed should be identified, and information on their respective role in the project shall be included. The prospective Contractor shall designate, by name, the project manager to be employed for this project. Substitution of the project manager by the selected contractor will not be allowed without prior approval by the Town of Atherton.
 3. **PAST EXPERIENCE/REFERENCES:** Provide at least three references from other government agencies or private parties including the following information:
 - a. Client name, client Manager, address, telephone number, and email address;
 - b. Contract Term (starting date and ending date);
 - c. Contract value;
 - d. Staff assigned to that project.
 4. **UNDERSTANDING OF SCOPE OF WORK AND WORK PLAN:** In this section, proposers are requested to demonstrate their understanding of the tasks and services requested in the Scope of Work and provide their Work Proposal/Approach to accomplish the services described in this RFP. Describe your business plan for marketing the event facilities and ensuring successful operations of the facilities and hosted events. In addition, in this section demonstrate an understanding of and approach toward excellent customer service, flexibility in meeting needs, coordination of other service providers and maintenance of facilities and equipment.
 5. **REVENUE SHARE PROPOSAL:** Indicate the proposed compensation for providing all-inclusive event services, expressed as a percentage of rental and/or catering fees collected. This section shall also include desired agreement term length, initial term not to exceed three (3) years.
 6. **DISCLOSURE:** of any past, ongoing, or potential conflicts of interest that the firm or person may have as a result of performing the anticipated work.

NOTE: It is unlawful for any person engaged in business within this state to sell or use any article or product as a "loss leader" as defined in Section 17030 of the Business and Professions Code.

PART C – Submittal Process

1. **Submittal Deadline:** Tuesday, May 7, 2024, at 2:00 p.m. Late submittals will not be accepted.
Format and Delivery: Submit three (3) letter-sized copies of the proposal to:

Robert Ovadia
Director of Public Works Town
of Atherton
80 Fair Oaks Lane
Atherton Ca 94027

and e-mail a PDF copy to Robert Ovadia at rovadia@ci.atherton.ca.us.

Submittals will not be returned.

Proposals submitted after the deadline will not be accepted for consideration.

Note that the Proposal, including all fees and compensation shall remain firm for a minimum of 90 days from the proposal submission deadline.

The Town reserves the right to accept or reject any or all proposals, or to alter the selection process in any lawful way, to postpone the selection process for its own convenience at any time, and to waive any non-substantive defects in this RFP or the proposals.

The Town is seeking to engage the most qualified person or firm. The Town reserves the right to negotiate with other qualified persons or firms, or to solicit additional statements of qualifications at any point in the project should it fail to negotiate a reasonable rate with the initially selected person or firm.

2. **Questions:** Interested parties, their representatives, agents or anyone else acting on their behalf, are specifically directed NOT to contact any Town employee, commission member, committee member, council member, or other Town employee or associate for any purpose related to this RFB other than as directed below. Contact with anyone other than as directed below may be cause for rejection of a bid.

ANY questions, technical or otherwise, pertaining to this Request for Proposals **must be submitted IN WRITING and directed ONLY to:**

Robert Ovadia
Director of Public Works
Town of Atherton
80 Fair Oaks Lane
Atherton Ca 94027
rovadia@ci.atherton.ca.us

Interpretations or clarifications considered necessary in response to such questions will be resolved by the issuance of formal Addenda to the RFB. Questions received after the date and time in the schedule will not be answered. Only questions that have been resolved by formal written Addenda via the Director of Public Works will be binding. Oral and other interpretations or clarifications will be without legal or contractual effect.

PART D – Selection Process

At the time proposals are opened, each proposal will be checked for the presence or absence of the required proposal contents.

The Town will evaluate the proposals on a 100-point scale using criteria set forth in the table below. Award if made, will be to the highest scored proposal.

CRITERION	MAXIMUM NUMBER OF POINTS
Firm Information/Background	<i>15</i>
Key Personnel/Staff Qualifications	<i>15</i>
Experience/References	<i>15</i>
Quality of Work Plan Submitted	<i>20</i>
Cost Share Proposal (including contract term)	<i>35</i>
Total	<i>100</i>

PART E - Proposed Timeline

March 1, 2024	RFP available on Town of Atherton website
April 3, 2024, 10:00 am	Pre-proposal site walkthrough
April 17, 2024, 5:00 pm	Submission deadline for written questions
May 7, 2024, 2:00 pm	Proposals Due
June 19, 2024	Recommendation to City Council

PART F – Contract Terms and Conditions

The selected vendor will be required to sign a Professional Services Agreement with the Town of Atherton and will be required to provide to the Town of Atherton the appropriate certificates of general liability insurance, vehicle insurance and workers compensation insurance. The contract may contain service performance requirements and penalties for non-compliance.

For additional information, contact Robert Ovidia, Director of Public Works, at (650) 752-0541.

Exhibit 1

Map of Holbrook-Palmer Park



Exhibit 2

Location of Event Facilities



Exhibit 3

Examples of Park Facilities

<u>Weddings</u>	<u>Social Events</u>	<u>Meetings/Classes</u>
	Parties/Gatherings	Corporate Events
	Birthdays Bar/Bat Mitzvahs Memorial Services Bridal Showers Holiday Parties	Meetings Seminars Retreats Picnics
	Group Activities/Fundraisers	Local Group Meetings
	School Picnics Graduation Ceremonies Art Expositions Ice Cream Socials Family Picnics/BBQ Company Picnics	Meetings * Community Discussions * Park Foundation * Atherton Disaster and Preparedness Team *
	Large Activities/Fundraisers	Classes
	Easter Egg Hunt * Music in the Park * Movies in the Park * National Night Out * Earth Day *	Yoga Folk Dancing Music for Families Dog Training Country Dancing

*Beyond the hours noted in the RFP, Contractor is not responsible for setup of Town events/activities. Town may waive rental fees for Town affiliated groups and related community events.

Exhibit 4

Fees

EFFECTIVE MARCH 22, 2024

Town of Atherton Master Fee Schedule

Park Fees				
All Park Fees are Based On Resident and Non-Resident Basis				
			ATHERTON RESIDENT	NON-ATHERTON RESIDENT
The Main House				
	Includes outdoor area adjacent porch or lower patio			
191	(Monday - Friday) 4 hour minimum		\$125 per hour	\$200 per hour
192	Saturday, Sunday, or Holidays (2 hour Minimum)		\$350 per hour	\$450 per hour
	Price does not include Refundable Security deposit			
193	Security Deposit		\$600	\$600
Outdoor Area (add on to Main House)-Exclusive Use				
	Price includes the rental of one of the following: Water Tower Lawn, or Event Garden			
194	Every day (4 hour minimum)		\$150 per hour	\$200 per hour
	Price does not include Refundable Security deposit			
195	Security Deposit		\$300	\$300
Carriage House				
196	Every Day (4 hour minimum)		\$125 per hour	\$200 per hour
	Price does not include Refundable Security deposit			
197	Security Deposit		\$600	\$600
Jennings Pavilion				
	Includes Water Tower Lawn, event garden, patio, and side lawn (subject to availability)			
198	Friday Day Use or Monday - Thursday (4 hour minimum)**		\$250 per hour	\$400 per hour
	**Day use has 4 hour minimum, up to 4pm. 6 hour minimum ending after 4pm.			
199	Friday Evenings, Saturday, Sunday, or Holidays (4-6 hour minimum)		\$750 per hour	\$1000 per hour
	Price does not include Refundable Security deposit			
200	Security Deposit		\$1,200	\$1,200
Tennis Courts Fees				
	Key Purchases:			
201	1 Standard Key **	Flat Fee	\$100	\$275
	**Resident Clay Court Access included in Standard Key Charge			
203	1 Clay Key ONLY	Flat Fee	\$50	
204	Clay Court Access (Non-resident)			\$30 per hour
Day Use Permit Fees Holbrook-Palmer Park				
205	13-25 people *	Flat Fee	\$100	\$150
206	26-50 people *	Flat Fee	\$175	\$300
	* Fee when registering at least one day in advance			
	Same Day Registration Doubles Day Use Permit Fee with a minimum of \$200			
207	North Meadow Rented as Day Use Fee	above 50 people requires rental of Carriage House		
OTHER PARK RENTAL FEES				
208	Baseball Field (Per Hour)			\$40 Per hour
209	Other Fields (Per Hour)			\$35 Per hour
Staff Hourly Rates				
210	Facility maintenance staff for services related to facility maintenance and preparation (Before & After Events)			\$130 per hour

**Town of Atherton
Master Fee Schedule**

Park Fees				
All Park Fees are Based On Resident and Non-Resident Basis				
			ATHERTON RESIDENT	NON-ATHERTON RESIDENT
211	Facility attendant staff for services related to on-site availability during event			\$65 per hour
Photo-Shoot Permits				
212	One (1) Day	Flat Fee		\$130
213	One (1) Month	Flat Fee		\$640
214	Drone Application Fee/Day	Flat Fee		\$190
215	Hosted Indoor Classes (Requires Separate Use Agreement)	Per hour		\$35 per hour
216	Hosted Outdoor Classes (Requires Separate Use Agreement)	Per hour		\$50 per hour

Exhibit 5

Park Inventory

	Main House	Pavilion	Carriage House	Corp Yard	Total
Chairs					
Chivari	1	203		174	378
Padded	63	149			222
Folding			146	53	199
Tables					
a6' Rectangle	1	12			13
8' Rectangle	10	14	4		28
Tall Round Glass Top		3			3
48" Round		4			4
60" Round	6	20	4		30
Umbrellas		6			6
AV Projector Screen		1			1
Mobile AV/Computer Screen		1			1
Podium		1			1
PA System		1			1
Appliances					
Gas Range	1	1			
Electric Cooktop			1		
Electric Oven		2	1		
Refrigerator	1	1	1		
Misc.					
Vacuum	1	1			
Floor Cleaner	1				
Janitor Closet	1	1	1		
Supply Room	1	2	1		
Office	1				