

Attachment B:  
Events Enterprises, Inc.  
FY 22-23  
SCRIP Purchase Order (CN1917)



County of Santa Barbara  
Purchasing Agent  
260 N San Antonio Rd,  
Santa Barbara, CA 93110

# Order CN1917

**Order date**

5/31/2022

**Delivery address**

Santa Barbara County  
BEHAVIORAL WELLNESS, AS DIRECTED

**Vendor**

79504  
EVENTS ENTERPRISES INC

PO BOX 1550  
FOLSOM  
CA  
95763  
HEATHER TANFANI PRES.  
HT@EVENTSWEBPAGE.COM

**Bill To**

Santa Barbara County  
429 N. SAN ANTONIO RD. SANTA BARBARA, CA 93110  
805-681-5225

**Refer Inquiries to Buyer**

Sean Burns  
seburns@countyofsb.org

**Terms of payment**

30 days

---

Item/Comments	Description	Preferred delivery date	Quantity	Unit	Price	Amount
000468- PROJECT DEVELOPMENT/MANAGEMENT	Events Enterprises, Inc., dba events! to provide planning and overall event coordination of the Person-Centered Engagement Strategies conference for the SCRIP WET Program as described in the attached Agreement, Exhibit A, Exhibit B, Exhibit B-1, and Exhibit C.		1.00	Lot	200,000.00	200,000.00

---

**Order Total USD** **200,000.00**

GENERAL: Events Enterprises, Inc., dba events! to provide planning and overall event coordination of the Person-Centered Engagement Strategies conference for the SCRIP WET Program as described in the attached Agreement, Exhibit A, Exhibit B, Exhibit B-1, and Exhibit C.

CONTRACT PERIOD: Start date, as directed. Termination date, as directed and NO LATER THAN 6/30/2023.

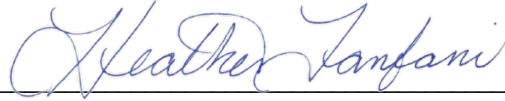
LIMITATIONS: Total expenditure for the period shall not exceed \$200,000. Any increase or decrease in this total amount may be authorized only upon written notice from the County Chief Procurement Officer.

STANDARD TERMS AND CONDITIONS FOR INDEPENDENT CONTRACTORS (ver. 2018 03 23) attached.

THIS CONTRACT IS NOT VALID FOR AMOUNTS IN EXCESS OF TWO HUNDRED THOUSAND DOLLARS (\$200,000)

NOTE TO CONTRACTOR: No payment will be due or payable unless this contract is properly executed and returned to the County Purchasing Office. Do not commence performance until you have executed this contract and returned it to the County of Santa Barbara Purchasing Division, 260 N San Antonio Rd, Santa Barbara, CA 93110.

Accepted By: (X) \_\_\_\_\_



Print Name/Title: Heather Tanfani, President, Events Enterprises, Inc. Date: 6-3-22

Applicable License # (Medical/Contractor/Etc.): \_\_\_\_\_

Phung Loman

COUNTY OF SANTA BARBARA

**(1) The order number and Bill to dept name shown above must appear on all invoices, shipping papers, packages and correspondence.**

(2) Mail invoices to the "bill to" address.

(3) All duty and/or taxes must be shown separately on invoice where applicable.

(4) This order is subject to the terms and conditions stated, including non-discrimination in employment, hazardous chemicals and equipment safety standards, that are available for viewing at [www.countyofsb.org](http://www.countyofsb.org).

For Goods the County Code Section 2-96 requires: If complaint is made that seller is engaging in discriminatory employment practices made unlawful by applicable state and federal laws, rules or regulations, and the State Fair Employment Practice Commission or the Federal Equal Employment Opportunities Commission determines that such unlawful discrimination exists, then the County of Santa Barbara may forthwith terminate this order.



## STANDARD TERMS & CONDITIONS FOR INDEPENDENT CONTRACTORS

THESE TERMS & CONDITIONS apply to the Contract established between the County of Santa Barbara, a political subdivision of the State of California ("COUNTY") by its Purchasing Division ("Purchasing"), and the individual or entity identified on the Contract form to which this document is attached ("CONTRACTOR"), including CONTRACTOR's agents, employees or sub-contractors. CONTRACTOR's signature on the Contract form means CONTRACTOR has read and accepted these terms and conditions.

1. **SCOPE OF SERVICES / COMPENSATION.** CONTRACTOR agrees to provide services to COUNTY, and COUNTY agrees to pay CONTRACTOR, according to the attached Statement of Work. (The term "Statement of Work" refers to all attached language describing the services to be performed and the compensation to be paid, whether found in a Proposal, Estimate, Quote, correspondence, and/or any other attached document, and includes the narrative text appearing on the Contract form, plus any subsequent amendment.) All work is to be performed under the direction of the "Designee" (that is, the person designated by the department identified in the Ship-To box on the Contract form). Payment will be subject to satisfactory performance as determined by the Designee. CONTRACTOR will be entitled to reimbursement for only those expenses specifically identified in the Statement of Work.
2. **STATUS AS INDEPENDENT CONTRACTOR.** CONTRACTOR will perform all of CONTRACTOR's services under this Contract as an independent contractor and not as COUNTY's employee. CONTRACTOR understands and acknowledges that CONTRACTOR will not be entitled to any of the benefits of a COUNTY employee, including but not limited to vacation, sick leave, administrative leave, health insurance, disability insurance, retirement, unemployment insurance, workers' compensation and protection of tenure. CONTRACTOR warrants that CONTRACTOR is authorized by law to perform all work contemplated in this Contract, and CONTRACTOR agrees to submit, upon request, verification of licensure or registration, or other applicable evidence of official sanction.
3. **BILLING & PAYMENT.** CONTRACTOR must submit CONTRACTOR invoice(s), which must include the contract number COUNTY assigns (see Contract form), to the Bill-To address on the Contract form, following completion of the increments identified in the Statement of Work. Unless otherwise specified in the Contract, COUNTY will pay CONTRACTOR within thirty (30) days from presentation of invoice.
4. **TAXES.** COUNTY will not be responsible for paying any taxes on CONTRACTOR's behalf, and should COUNTY be required to do so by state, federal, or local taxing agencies, CONTRACTOR agrees to promptly reimburse COUNTY for the full value of such taxes paid plus interest and penalty assessed, if any. These taxes include, but are not limited to, the following: FICA (Social Security), unemployment insurance contributions, income tax, disability insurance, and workers' compensation insurance. Notwithstanding the foregoing, if CONTRACTOR is using a non-California address or a California P.O. Box address for conducting its business with COUNTY, CONTRACTOR will be subject to required nonresident withholding for services that CONTRACTOR provides in California for COUNTY, unless CONTRACTOR is a government entity or unless CONTRACTOR provides COUNTY with a California withholding form that shows CONTRACTOR is exempt from withholding.
5. **CONFLICT OF INTEREST.** CONTRACTOR covenants that CONTRACTOR presently has no employment or interest and will not acquire any employment or interest, direct or indirect, which would conflict in any manner or degree with the performance of services required to be performed under this Contract. CONTRACTOR further covenants that in the performance of this Contract, CONTRACTOR will employ no person having any such interest. CONTRACTOR must promptly disclose to COUNTY, in writing, any potential conflict of interest.
6. **OWNERSHIP OF DOCUMENTS AND INTELLECTUAL PROPERTY.** COUNTY will be the owner of the following items incidental to this Contract, upon production and whether or not completed: all data collected, all documents of any type whatsoever (paper or electronic), and any material necessary for the practical use of the data and/or documents from the time of collection and/or production, whether or not performance under this Contract is completed or terminated prior to completion. CONTRACTOR will not release any materials under this paragraph except after COUNTY's prior written approval.
  - A. No materials, inventions or data produced in whole or in part under this Contract will be subject to copyright or other intellectual property rights in the United States or in any other country except as determined at COUNTY's sole discretion.
  - B. COUNTY will have the unrestricted authority to copy, adapt, perform, display, publish, disclose, distribute, create derivative works from, and otherwise use in whole or in part, any reports, data, documents or other materials prepared under this Contract. CONTRACTOR agrees to take such actions and execute and deliver such documents as may be needed to validate, protect and confirm the rights provided hereunder. CONTRACTOR warrants that any items provided under this Contract will not infringe upon any intellectual property or proprietary rights of any third party. CONTRACTOR at its own expense shall defend, indemnify, and hold harmless COUNTY against any claim that any items provided by CONTRACTOR hereunder infringe upon intellectual or other proprietary rights of a third party, and CONTRACTOR shall pay any damages, costs, settlement amounts, and fees (including attorneys' fees) that may be incurred by COUNTY in connection with any such claims.
  - C. These Ownership of Documents and Intellectual Property and Copyright and Intellectual Property provisions (Section 6, including subdivisions A-C) shall survive any termination of this Contract.
7. **COUNTY PROPERTY.** COUNTY's property, documents, and information provided for CONTRACTOR's use in connection with the services shall remain COUNTY's property, and CONTRACTOR shall return any such items whenever requested by COUNTY and/or required by this Agreement. CONTRACTOR may use such items only in connection with providing the services. CONTRACTOR shall not disseminate any COUNTY property, documents, or information without COUNTY's prior written consent.
8. **RECORDS, AUDIT, AND REVIEW.** CONTRACTOR must keep such business records pursuant to this Contract as would be kept by a reasonably prudent practitioner of CONTRACTOR's profession, and will maintain those records for at least four (4) years following the termination of this Contract. All accounting records must be kept in accordance with generally accepted accounting practices. COUNTY will have the right to audit and review all such documents and records at any time during CONTRACTOR's regular business hours or upon reasonable notice. In addition, if this Contract exceeds ten thousand dollars (\$10,000.00), CONTRACTOR shall be subject to the examination and audit of the California State Auditor, at the request of the COUNTY or as part of any audit of the COUNTY, for a period of three (3) years after final payment under the Contract (Cal. Govt. Code Section 8546.7). CONTRACTOR shall participate in any audits and reviews, whether by COUNTY or the State, at no charge to COUNTY. If federal, state or COUNTY audit exceptions are made relating to this CONTRACT, CONTRACTOR shall reimburse all costs incurred by federal, state, and/or COUNTY governments associated with defending against the audit exceptions or performing any audits or follow-up audits, including but not limited to: audit fees, court costs, attorneys' fees based upon a reasonable hourly amount for attorneys in the community, travel costs, penalty assessments and all other costs of whatever nature. Immediately upon notification from COUNTY, CONTRACTOR shall reimburse the amount of audit exceptions and any other related costs directly to COUNTY as specified by COUNTY in the notification.
9. **INSURANCE AND INDEMNIFICATION.** CONTRACTOR agrees to the indemnification and insurance provisions as set forth in Exhibit X attached hereto and incorporated herein by reference.
10. **NONDISCRIMINATION.** The County's Unlawful Discrimination Ordinance (Article XIII of Chapter 2 of the Santa Barbara County Code) applies to this Contract and is incorporated into the Contract by this reference with the same force and effect as if the ordinance were specifically set out herein, and CONTRACTOR agrees to comply with that ordinance.
11. **NONEXCLUSIVE AGREEMENT.** CONTRACTOR understands that this is not an exclusive Contract and that COUNTY has the right to negotiate with and enter into contracts with others providing the same or similar services as those CONTRACTOR provides.
12. **NON-ASSIGNMENT.** CONTRACTOR will not assign any of CONTRACTOR's rights nor transfer any of CONTRACTOR's obligations under this Contract without COUNTY's prior written consent, and any attempt to so assign or so transfer without such consent shall be void and without legal effect and shall constitute grounds for termination.
13. **TERMINATION.**

- A. **By COUNTY.** COUNTY may, by written notice to CONTRACTOR, terminate this Contract in whole or in part at any time, whether for COUNTY's convenience, for nonappropriation of funds, or because of the failure of CONTRACTOR to fulfill the obligations herein.
1. **For Convenience.** COUNTY may terminate this Contract in whole or in part upon thirty (30) days written notice. During the thirty (30) day period, CONTRACTOR shall, as directed by COUNTY, wind down and cease its services as quickly and efficiently as reasonably possible, without performing unnecessary services or activities and by minimizing negative effects on COUNTY from such winding down and cessation of services.
  2. **For Nonappropriation of Funds.** Notwithstanding any other provision of this Contract, in the event that no funds or insufficient funds are appropriated or budgeted by federal, state or COUNTY governments, or funds are not otherwise available for payments in the fiscal year(s) covered by the term of this Contract, then COUNTY will notify CONTRACTOR of such occurrence and COUNTY may terminate or suspend this Contract in whole or in part, with or without a prior notice period. Subsequent to termination of this Contract under this provision, COUNTY shall have no obligation to make payments with regard to the remainder of the term.
  3. **For Cause.** Should CONTRACTOR default in the performance of this Contract or materially breach any of its provisions, COUNTY may, at COUNTY's sole option, terminate or suspend this Contract in whole or in part by written notice. Upon receipt of notice, CONTRACTOR shall immediately discontinue all services affected (unless the notice directs otherwise) and notify COUNTY as to the status of its performance. The date of termination shall be the date the notice is received by CONTRACTOR, unless the notice directs otherwise.
- B. **By CONTRACTOR.** Should COUNTY fail to pay CONTRACTOR all or any part of the payment set forth in EXHIBIT B, CONTRACTOR may, at CONTRACTOR's option terminate this Contract if such failure is not remedied by COUNTY within thirty (30) days of written notice to COUNTY of such late payment.
- C. Upon termination, CONTRACTOR shall deliver to COUNTY all data, estimates, graphs, summaries, reports, and all other property, records, documents or papers as may have been accumulated or produced by CONTRACTOR in performing this Contract, whether completed or in process, except such items as COUNTY may, by written permission, permit CONTRACTOR to retain. Notwithstanding any other payment provision of this Contract, COUNTY shall pay CONTRACTOR for satisfactory services performed to the date of termination to include a prorated amount of compensation due hereunder less payments, if any, previously made. In no event shall CONTRACTOR be paid an amount in excess of the full price under this Contract nor for profit on unperformed portions of service. CONTRACTOR shall furnish to COUNTY such financial information as in the judgment of COUNTY is necessary to determine the reasonable value of the services rendered by CONTRACTOR. In the event of a dispute as to the reasonable value of the services rendered by CONTRACTOR, the decision of COUNTY shall be final. The foregoing is cumulative and shall not affect any right or remedy which COUNTY may have in law or equity.
14. **NOTICE.** From CONTRACTOR: CONTRACTOR must send or deliver any required notice to both the Designee and to Purchasing at the addresses appearing on the Contract form. From COUNTY: Either Designee or Purchasing must send or deliver any required notice to CONTRACTOR at the address last known to the sender. *Effective Date:* Notices mailed by US Postal Service first-class, receipt of which is unacknowledged, are effective three days from date of mailing. Other notices are effective upon delivery by hand, proof of delivery by common carrier, or acknowledgement of receipt, whichever is earlier.
15. **ENTIRE AGREEMENT AND AMENDMENT.** In conjunction with the matters considered herein, this Contract, including its attachments, contains the entire understanding and agreement of the parties and there have been no promises, representations, agreements, warranties or undertakings by any of the parties, either oral or written, of any character or nature hereafter binding except as set forth herein. This Contract may be altered, amended or modified only by an instrument in writing (executed by Purchasing) and by no other means. Each party waives their future right to claim, contest or assert that this Contract was modified, canceled, superseded, or changed by any oral agreements, course of conduct, waiver or estoppel.
16. **COMPLIANCE WITH LAW.** CONTRACTOR shall, at its sole cost and expense, comply with all County, State and Federal ordinances and statutes now in force or which may hereafter be in force with regard to this Agreement. The judgment of any court of competent jurisdiction, or the admission of CONTRACTOR in any action or proceeding against CONTRACTOR, whether COUNTY is a party thereto or not, that CONTRACTOR has violated any such ordinance or statute, shall be conclusive of that fact as between CONTRACTOR and COUNTY.
17. **CALIFORNIA LAW.** This Contract is governed by the laws of the State of California. Any litigation regarding this Contract or its contents must be filed in the County of Santa Barbara, if in state court, or in the federal district court nearest to Santa Barbara County, if in federal court.
18. **PRECEDENCE.** In the event of conflict between the provisions contained in these numbered paragraphs and the provisions contained in the Statement of Work, the provisions of this document shall prevail unless 1) otherwise specified on the Contract form to which this document is attached, or 2) waived by amendment hereon with dated initials of Purchasing staff.
19. **DEBARMENT AND SUSPENSION.** CONTRACTOR certifies to COUNTY that it and its employees and principals are not debarred, suspended, or otherwise excluded from or ineligible for, participation in federal, state, or county government contracts. CONTRACTOR certifies that it shall not contract with a subcontractor that is so debarred or suspended.
20. **NO PUBLICITY OR ENDORSEMENT.** CONTRACTOR shall not use COUNTY's name or logo or any variation of such name or logo in any publicity, advertising or promotional materials. CONTRACTOR shall not use COUNTY's name or logo in any manner that would give the appearance that COUNTY is endorsing CONTRACTOR. CONTRACTOR shall not in any way contract on behalf of or in the name of COUNTY. CONTRACTOR shall not release any informational pamphlets, notices, press releases, research reports, or similar public notices concerning COUNTY or its projects, without obtaining the prior written approval of COUNTY.
21. **SEVERABILITY.** If any one or more of the provisions contained herein shall for any reason be held to be invalid, illegal or unenforceable in any respect, then such provision or provisions shall be deemed severable from the remaining provisions hereof, and such invalidity, illegality or unenforceability shall not affect any other provision hereof, and this Contract shall be construed as if such invalid, illegal or unenforceable provision had never been contained herein.
22. **REMEDIES NOT EXCLUSIVE.** No remedy herein conferred upon or reserved to COUNTY is intended to be exclusive of any other remedy or remedies, and each and every such remedy, to the extent permitted by law, shall be cumulative and in addition to any other remedy given hereunder or now or hereafter existing at law or in equity or otherwise.
23. **SURVIVAL.** All provisions of this Contract which by their nature are intended to survive the termination or expiration of this Contract shall survive such termination or expiration.
24. **NO WAIVER.** No delay or omission of COUNTY to exercise any right or power arising upon the occurrence of any event of default shall impair any such right or power or shall be construed to be a waiver of any such default or an acquiescence therein; and every power and remedy given by this Agreement to COUNTY shall be exercised from time to time and as often as may be deemed expedient in the sole discretion of COUNTY.
25. **SUCCESSORS AND ASSIGNS.** All representations, covenants and warranties set forth in this Agreement, by or on behalf of, or for the benefit of any or all of the parties hereto, shall be binding upon and inure to the benefit of such party, its successors and assigns.
26. **EXECUTION IN COUNTERPARTS; AUTHORITY.** This Agreement may be executed in counterparts and each shall be deemed an original, and all shall constitute the same instrument. All signatories and parties to this Agreement warrant and represent that they have the power and authority to enter into this Agreement in the names, titles and capacities herein stated and on behalf of any entities, persons, or firms represented or purported to be represented by such entity(ies), person(s), or firm(s) and all formal requirements necessary to enter into this Agreement have been fully complied with. Furthermore, by entering into this Agreement, CONTRACTOR hereby warrants that it shall not have breached the terms or conditions of any other contract or agreement to which CONTRACTOR is obligated, which breach would have a material effect hereon.

## EXHIBIT A

### STATEMENT OF WORK

1. **PERFORMANCE.** Events Enterprises, Inc. dba events! (Contractor), a certified, full-service meeting planner, shall provide overall event coordination for Santa Barbara County Department of Behavioral Wellness, on behalf of the Southern Counties Regional Partnerships (SCRCP), for the *Person-Centered Engagement Strategies* Conference.

Contractor shall:

- A. Have the background, training, work experience, accreditation, licenses, and supervision necessary for the performance of services in a manner of, and according to the standards observed by, a practitioner of the same profession and in keeping with all pertinent Federal, State, and County laws; and
- B. Warrant that said accreditation and licensing information furnished to County is complete and accurate, and notify County promptly of any changes in this information.

2. **OBJECTIVES.**

- A. Acting as an independent contractor in a consulting capacity and as authorized agent for Behavioral Wellness/SCRCP, Contractor shall:
  - i. Create a strategic event plan;
  - ii. Develop event concept;
  - iii. Coordinate event logistics;
  - iv. Implement event plan to ensure a well-managed conference/meeting; and
  - v. Ensure the conference furthers the goals of SCRCP.

3. **SERVICES.** Contractor shall provide the following:

- A. Logistics planning for SCRCP's *Person-Centered Engagement Strategies* Conference:
  - i. Attendance goal is 200 participants;
  - ii. Schedule two (2) consecutive mid-week days; and
  - iii. Conference date to be determined.
- B. Event Coordination Services:
  - i. Event Coordinator:
    - a. Designate one (1) key person as the single point of contact
  - ii. Communication.
    - a. Send weekly email reports containing status updates to Behavioral Wellness/SCRCP designated staff;
    - b. Attend one (1) pre-event meeting with the location to discuss:
      - 1) Contracts;
      - 2) Food and beverage;
      - 3) Location set-up/requirements;

## EXHIBIT A

- 4) Parking;
  - 5) Floor plan;
  - 6) Rental equipment; and
  - 7) Grounds requirements.
  - 8) Continue to communicate with key contacts and vendors throughout the project.
- iii. Budget Development.
    - a. Research and negotiate costs based on event requirements;
    - b. Provide SCRП with a detailed budget for event expenses; and
    - c. Communicate any changes to committee for approval throughout the project.
  - iv. Financial Management.
    - a. Work with Behavioral Wellness/SCRП to develop a system for approval and processing of all vendor invoices and payments:
      - 1) Submit all contracts and invoices to Behavioral Wellness/SCRП designated staff for approval.
    - b. Ensure vendors adhere to budgets and timelines;
    - c. Submit all monthly financial reports to Behavioral Wellness/SCRП for review; and
    - d. Work within the budget approved by Behavioral Wellness/SCRП for the conference.
  - v. Timeline.
    - a. Submit timeline to Behavioral Wellness/SCRП for all event logistics to include:
      - 1) Dates for development of electronic invitations, programs, agenda and syllabus, contents determined by SCRП conference planning committee; and
      - 2) Deadlines for lodging, food and beverage, speaker travel, vendor confirmations, payments and deposits.
  - vi. Theme.
    - a. Provide Behavioral Wellness/SCRП, by 10/30/19, with options for conference theme, which will be consistent on all event materials with the theme to be decided by SCRП conference planning committee.
  - vii. Committee Coordination and Meetings.
    - a. Delegate and follow-up with committee members who are responsible for assigned tasks;
    - b. Schedule and coordinate planning committee meetings; and
    - c. Compile and distribute meeting notices, materials, agendas and minutes.

## EXHIBIT A

- viii. Location-Site Research.
  - a. Handle all aspects of site selection in collaboration with Behavioral Wellness/SCRP designated staff;
  - b. Negotiate contracts for accommodations, meeting rooms and meals;
  - c. Review attrition walk clause, cancellation and arbitration fees, indemnification and tax-factoring procedures;
  - d. Establish a master account with location for conference expenses; and
  - e. Submit a timeline of items due (final signing deadline, deposits, etc).
- ix. Location.
  - a. Handle all facility logistics and planning needs:
    - 1) Work with venue to provide facility and area maps, air and ground transportation, and parking instructions.
  - b. Provide all materials and equipment needed:
    - 1) Coordinate set-up of rooms, all audio-visual equipment, directional signs, placement of any marketing materials and banners.
  - c. Determine and plan for any special needs or requirements to include:
    - 1) Electrical hook-ups, disabilities, or security.
  - d. Create a floor plan for all meeting spaces;
    - 1) Includes registration area, food and beverage stations, room set-up and audio-visual equipment.
- x. Website.
  - a. Design, implement, update, and maintain a registration page website to:
    - 1) Reflect conference theme and be user friendly;
    - 2) Load customized online registration page on secure server and link to Behavioral Wellness/SCRP website:
      - a) Work with Behavioral Wellness/SCRP website staff to place logo on Behavioral Wellness/SCRP homepage that will link to registration page; and
      - b) Provide attendees with ability to register electronically or download and mail or fax form to events for inclusion in the attendee database.
    - 3) Provide monthly reports on registration status.
- xi. Attendee Invitations Save the Date Announcements, Database, Roster, and Confirmations.
  - a. Work with Behavioral Wellness/SCRP to develop content of the registration invitation and save the date announcement:



## EXHIBIT A

- 1) Hotel and meal information, registration procedures and general conference agenda will be included on invitation.
  - b. Develop an attendee roster, for inclusion in the syllabus, that contains Behavioral Wellness/SCRP approved information, to include:
    - 1) Attendees and Speakers' names, titles, addresses, phone, and email addresses.
  - c. Send confirmation notices to each attendee, to include:
    - 1) Overnight accommodation reservation number, general travel and meeting location information.
- xii. Program and Script.
- a. Work with Behavioral Wellness/SCRP to prepare program script;
  - b. Distribute script to all speakers and committee members;
  - c. Hire a graphic designer and printer to produce conference program;
  - d. Program will include:
    - 1) Agenda of the day's activities;
    - 2) Floor plan;
    - 3) Announcements;
    - 4) Roster; and
    - 5) Information sheet to include:
      - a) Proper attire, food, pick-up and drop-off times, etc.
- xiii. Identification.
- a. Provide name badge options for Behavioral Wellness/SCRP staff to select from;
  - b. Purchase holders;
  - c. Print badges which will include name, county and title; and
  - d. Assemble one name badge per attendee.
- xiv. Signage.
- a. Determine program's signage needs;
  - b. Obtain estimates for signage options; and
  - c. Coordinate production and transportation signage to meeting location.
- xv. Meeting Materials.
- a. Work with Behavioral Wellness/SCRP to determine appropriate, unique branded conference material (i.e. thumb drives) for each attendee;
  - b. Arrange and confirm transport of these items to the venue; and
  - c. Ship any remaining conference materials to Behavioral Wellness/SCRP.

## EXHIBIT A

- xvi. Session Assignments.
  - a. Collect information regarding session preferences from registrants;
  - b. Work with Behavioral Wellness/SCRIP to determine session assignment guidelines; and
  - c. Implement guidelines at registration as needed.
- xvii. Transportation.
  - a. Provide directional, transportation, and parking information on the conference website (use of public transportation will be encouraged).
- xviii. Rooming List.
  - a. Coordinate all lodging details for attendees;
  - b. Compile, update and submit a rooming list to the location prior to the due date;
  - c. Submit updated lists weekly; and
  - d. Create a rooming list to serve as:
    - 1) The master participant list; and
    - 2) Confirmation of arrivals at the conference.
- xix. Equipment/Audio Visual.
  - a. Negotiate and confirm fees for any equipment needed, to include:
    - 1) Tables, chairs, linens, easels, electrical hook-ups, staging, PA system, audio-visual.
  - b. Negotiate, contract, review and finalize all audio-visual logistics for the conference:
    - 1) Confirm and accommodate audio visual needs of speakers and participants for general assembly, breakout sessions and general sessions; and
    - 2) Provide an on-site technician who will be available throughout the conference to ensure quality visual and sound.
- xx. Food and Beverage.
  - a. Coordinate menu with event location:
    - 1) Two (2) continental breakfasts;
    - 2) Two (2) AM/PM breaks;
    - 3) Two (2) luncheons; and
    - 4) One (1) evening reception.
  - b. Develop room set-up plans and confirm banquet event orders; and
  - c. Provide for dietary restrictions:

## EXHIBIT A

- 1) Dietary restriction feedback to be given at registration; and
  - 2) Work with venue to ensure dietary needs are met.
- xxi. Conference Evaluations.
- a. Distribute an evaluation form to attendees at conclusion of conference, collect forms and give to Behavioral Wellness/SCRP staff.
- xxii. On-Site Registration.
- a. Organize registration area for efficiency;
  - b. Provide each attendee with a name badge, program and unique branded conference material;
  - c. Provide a name badge printer for printing of last-minute badges or name changes; and
  - d. Prepare registration area no later than one (1) hour before the conference begins.
- xxiii. Speakers' Conference Needs and Travel and Accommodation Arrangements.
- a. Work with Behavioral Wellness/SCRP to contact and finalize logistics for conference speakers;
  - b. Develop and collect a speaker needs questionnaire;
  - c. Review speaker contracts and requirements;
  - d. Ensure on-stage needs of speaker are addressed;
  - e. Reimburse speakers for approved expenses and honorariums;
  - f. Ensure rooms are set up with needed equipment per staff instructions;
  - g. Provide each speaker with information to arrange travel for themselves; and
  - h. Block and manage rooms for speakers.
- xxiv. Permits.
- a. Submit any permit or insurance requirements to Behavioral Wellness/SCRP; and
  - b. Ensure that each vendor submits required insurance certificate to the event location.
- xxv. Shipments and Storage. Contractor shall arrange for:
- a. Shipment of all meeting materials to the location and back to Behavioral Wellness/SCRP at the conclusion of the meeting;
  - b. Receipt and storage of meeting materials with the event location; and
  - c. Support in assembling and displaying these materials.
- xxvi. Continuing Education Credits (CEC).
- a. Work with Behavioral Wellness/SCRP to process CECs and submit completed forms to the appropriate associations.

## EXHIBIT A

### xxvii. On-Site Staffing.

- a. Three (3) staff members to monitor the conference and attend to every detail;
- b. Same three (3) staff members will be available throughout the conference and for any “last minute” needs from attendees; and
- c. Provide a supply box with miscellaneous items– office supplies, hardware, first-aid kit.

### xxviii. On-Site Confirmations.

- a. Arrive with staff at location prior to start of conference; and
- b. Conduct final confirmation interviews with all key site personnel and vendors to ensure all arrangements have been made and all materials are in place.

### xxix. Follow-Up Report.

- a. Provide an event summary after the conference including:
  - 1) Final event income/expense report;
  - 2) Attendance data;
  - 3) Participant’s evaluations;
  - 4) Highlights; and
  - 5) A critique with suggestions for the next event.

## 4. **SANTA BARBARA COUNTY DEPARTMENT OF BEHAVIORAL WELLNESS / SOUTHERN COUNTIES REGIONAL PARTNERSHIP / SCRP CONFERENCE COMMITTEE RESPONSIBILITIES.**

- A. Provide one (1) contact person and one (1) back-up person to Contractor for communication and decisions;
- B. Provide a website contact to post registration link;
- C. Identify potential speakers and make initial contact;
- D. Identify educational goals for the sessions and the presenters/facilitators for each session;
- E. Behavioral Wellness/SCRP will provide the electronic invitations to each of their County representatives to distribute to their colleagues;
- F. Reimburse Contractor for all meeting planner and vendor expenses inclusive of:
  - i. Food and beverage, online registration, travel, mileage, accommodations, equipment, signage, shipping etc. which have been pre-approved by SCRP’s point of contact, in accordance with the budget estimates set forth in Exhibits B and B-1.
- G. Obtain written authorization from Contractor to print any company information, telephone, address on any media/publicity material; and

## EXHIBIT A

H. Approve the following:

- i. Budget;
- ii. Contracts and invoices;
- iii. Theme and décor;
- iv. Printed materials;
- v. Food and beverage menus; and
- vi. Event script.

## EXHIBIT B

### Financial Provisions

(With attached Schedule of Rates [Exhibit B-1])

1. Contract Maximum Value. For services to be rendered under this contract, Contractor shall be paid at the rate specified in the Schedule of Rates (Exhibit B-1), with a maximum value not to exceed **\$200,000 for FY 22-23.**
2. Payment for Services: Payment for services and/or reimbursement of costs shall be made upon Contractor's satisfactory performance, based upon the scope and methodology contained in EXHIBIT A.
  - A. The Santa Barbara County Department of Behavioral Wellness/SCRIP agrees to pay the Contractor **\$40,000** which will be designated a flat fee and is not to be altered, unless agreed to in writing by both parties. The flat fee is determined by estimated hourly wages and shall be paid monthly, at a rate of \$4,000 per month for 10 consecutive months. Reimbursement is due within thirty (30) days of the invoice date. Contractor does not mark-up vendor costs and all meeting planner expenses and vendor invoices will be attached to reimbursement invoices.
  - B. Behavioral Wellness/SCRIP shall retain the option to terminate the contract upon thirty (30) days written notice. In the event that SCRIP/Behavioral Wellness terminates the contract, Contractor shall be reimbursed at the rate of \$100 per hour for all time expended on or prior to the date of receipt of such written notice in lieu of the \$4,000 monthly fee in the month of termination.
  - C. Services shall be based upon the rates as defined in EXHIBIT B-1. Invoices submitted for payment, based upon EXHIBIT B-1, must contain sufficient detail and provide supporting documentation to enable an audit of the charges.
3. Proper Invoice. Contractor shall submit to County's Designated Representative an invoice or certified claim on the County treasury for the service performed over the period specified. County's representative shall evaluate the quality of the service performed, and if found to be satisfactory, shall initiate processing of payment.
  - A. The invoice must show the Board Contract number, the services performed or detailed statement of purchases with receipts, and the rate and authorization form, if applicable.
  - B. County's Designated Representative:

Santa Barbara County  
Department of Behavioral Wellness  
Attn: Accounts Payable  
429 North San Antonio Road Santa Barbara, CA 93110  
[ap@sbcbswell.org](mailto:ap@sbcbswell.org)
4. Correction of Work. County's failure to discover or object to any unsatisfactory work or billings prior to payment will not constitute a waiver of County's right to require Contractor to correct such work or billings or seek any other legal remedy.

**EXHIBIT B-1**

**Schedule of Rates and Contract Maximum**

<u><b>Type of Service</b></u>	<u><b>Cost Per Unit</b></u>	<u><b>Units of Service</b></u>	<u><b>Total Maximum Contract Value</b></u>
Conference Planning/Coordination Fee	\$4,000/month	Conference scheduled for two (2) consecutive weekdays  10 months	<b>\$40,000</b>
Conference Expenses  **Estimated Itemized Budget, Inclusive of:		Hotel Accommodations Meeting Rooms Food and Beverage Audio Visual Honorariums Speaker Expenses Printed Materials Signage Name Badges Promotional Items Registration Website Decoration Gratuity Miscellaneous Staff Expenses Contingency	\$51,200 \$0 \$62,000 \$18,500 \$9,500 \$2,000 \$3,000 \$300 \$400 \$2,800 \$1,400 \$4,100 \$450 \$350 \$0 \$0
		Estimated Expenses Total for FY 22-23	<b>\$156,000</b>
<b>Total Maximum Contract Amount for FY 22-23 Not to Exceed:</b>			<b>*\$200,000</b>
*Inclusive of all travel, lodging and per diem for three staff members.			

## EXHIBIT C

### INDEMNIFICATION AND INSURANCE REQUIREMENTS (FOR THIS EVENTS CONTRACT ONLY)

#### INDEMNIFICATION

Contractor agrees to indemnify, defend (with counsel reasonably approved by County) and hold harmless County and its officers, officials, employees, agents and volunteers from and against any and all claims, actions, losses, damages, judgments and/or liabilities arising out of this Agreement from any cause whatsoever, including the acts, errors or omissions of any person or entity and for any costs or expenses (including but not limited to attorneys' fees) incurred by County on account of any claim except where such indemnification is prohibited by law. Contractor's indemnification obligation applies to County's active as well as passive negligence but does not apply to County's sole negligence or willful misconduct.

#### NOTIFICATION OF ACCIDENTS AND SURVIVAL OF INDEMNIFICATION PROVISIONS

Contractor shall notify County immediately in the event of any accident or injury arising out of or in connection with this Agreement. The indemnification provisions in this Agreement shall survive any expiration or termination of this Agreement.

#### INSURANCE

Contractor shall procure and maintain for the duration of this Agreement insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work hereunder and the results of that work by the Contractor, its agents, representatives, employees or subcontractors.

##### A. Minimum Scope of Insurance

Coverage shall be at least as broad as:

1. **Commercial General Liability (CGL):** Insurance Services Office (ISO) Form CG 00 01 covering CGL on an "occurrence" basis, including products-completed operations, personal & advertising injury, with limits no less than \$1,000,000 per occurrence and \$2,000,000 in the aggregate.
2. **Automobile Liability:** ISO Form Number CA 00 01 covering any auto (Code 1), or if Contractor has no owned autos, hired, (Code 8) and non-owned autos (Code 9), with limit no less than \$1,000,000 per accident for bodily injury and property damage.
3. **Workers' Compensation:** as required by the State of California, with Statutory Limits, and Employer's Liability Insurance with limit of no less than \$1,000,000 per accident for bodily injury or disease. This provision does not apply if CONTRACTOR has no employees as defined in Labor Code Section 3350 et seq. during the entire period of this Agreement and Contractor submits a written statement to the County stating that fact.



## EXHIBIT C

4. **Professional Liability** (Errors and Omissions) Insurance appropriate to the Contractor's profession, with limit of no less than \$1,000,000 per occurrence or claim, \$1,000,000 aggregate.

If the Contractor maintains higher limits than the minimums shown above, the County requires and shall be entitled to coverage for the higher limits maintained by the Contractor. Any available insurance proceeds in excess of the specified minimum limits of insurance and coverage shall be available to the County.

### B. Other Insurance Provisions

The insurance policies are to contain, or be endorsed to contain, the following provisions:

1. **Additional Insured** – County, its officers, officials, employees, agents and volunteers are to be covered as additional insureds on the CGL policy with respect to liability arising out of work or operations performed by or on behalf of the Contractor including materials, parts, or equipment furnished in connection with such work or operations. General liability coverage can be provided in the form of an endorsement to the Contractor's insurance at least as broad as ISO Form CG 20 10 11 85 or if not available, through the addition of both CG 20 10 and CG 20 37 if a later edition is used).
2. **Primary Coverage** – For any claims related to this Agreement, the Contractor's insurance coverage shall be primary insurance as respects the County, its officers, officials, employees, agents and volunteers. Any insurance or self-insurance maintained by the County, its officers, officials, employees, agents or volunteers shall be excess of the Contractor's insurance and shall not contribute with it.
3. **Notice of Cancellation** – Each insurance policy required above shall provide that coverage shall not be canceled, except with notice to the County.
4. **Waiver of Subrogation Rights** – Contractor hereby grants to County a waiver of any right to subrogation which any insurer of said Contractor may acquire against the County by virtue of the payment of any loss under such insurance. Contractor agrees to obtain any endorsement that may be necessary to effect this waiver of subrogation, but this provision applies regardless of whether or not the County has received a waiver of subrogation endorsement from the insurer.
5. **Deductibles and Self-Insured Retention** – Any deductibles or self-insured retentions must be declared to and approved by the County. The County may require the Contractor to purchase coverage with a lower deductible or retention or provide proof of ability to pay losses and related investigations, claim administration, and defense expenses within the retention.
6. **Acceptability of Insurers** – Unless otherwise approved by Risk Management, insurance shall be written by insurers authorized to do business in the State of California and with a minimum A.M. Best's Insurance Guide rating of "A- VII".

## EXHIBIT C

7. **Verification of Coverage** – Contractor shall furnish the County with proof of insurance, original certificates and amendatory endorsements as required by this Agreement. The proof of insurance, certificates and endorsements are to be received and approved by the County before work commences. However, failure to obtain the required documents prior to the work beginning shall not waive the Contractor’s obligation to provide them. The Contractor shall furnish evidence of renewal of coverage throughout the term of the Agreement. The County reserves the right to require complete, certified copies of all required insurance policies, including endorsements required by these specifications, at any time.
8. **Failure to Procure Coverage** – In the event that any policy of insurance required under this Agreement does not comply with the requirements, is not procured, or is canceled and not replaced, County has the right but not the obligation or duty to terminate the Agreement. Maintenance of required insurance coverage is a material element of the Agreement and failure to maintain or renew such coverage or to provide evidence of renewal may be treated by County as a material breach of contract.
9. **Subcontractors** – Contractor shall require and verify that all subcontractors maintain insurance meeting all the requirements stated herein, and Contractor shall ensure that County is an additional insured on insurance required from subcontractors.
10. **Claims Made Policies** – If any of the required policies provide coverage on a claims-made basis:
  - a) The Retroactive Date must be shown and must be before the date of the contract or the beginning of contract work.
  - b) Insurance must be maintained and evidence of insurance must be provided for at least five (5) years after completion of contract work.
  - c) If coverage is canceled or non-renewed, and not replaced with another claims-made policy form with a Retroactive Date prior to the contract effective date, the Contractor must purchase “extended reporting” coverage for a minimum of five (5) years after completion of contract work.
11. **Special Risks or Circumstances** – County reserves the right to modify these requirements, including limits, based on the nature of the risk, prior experience, insurer, coverage, or other special circumstances.

Any change requiring additional types of insurance coverage or higher coverage limits must be made by amendment to this Agreement. Contractor agrees to execute any such amendment within thirty (30) days of receipt.

Any failure, actual or alleged, on the part of County to monitor or enforce compliance with any of the insurance and indemnification requirements will not be deemed as a waiver of any rights on the part of County.