



REQUEST FOR QUOTE

For: **Private Markets Emerging Manager Virtual Symposium**

Event	Date*	Time
Vendor's Electronic Question Due Date (See below note)	2/5/24	2:00 PM
Quote Submission Date (See below note)	2/26/24	2:00 PM

*Dates are subject to change. All times contained in the RFQ refer to Eastern Time.

NOTE: Questions submitted as part of the Q&A period must be submitted to DOI.RFP@treas.nj.gov by the date and time listed above. Questions should be directly tied to the RFQ and asked in consecutive order, from beginning to end, following the organization of the RFQ; and each question should begin by referencing the RFQ page number and section number to which it relates.

In order to be considered for an award, a Vendor's Quote must be received by the Division of Investment by the date and time listed above. Vendors shall submit Quotes to DOI.RFP@treas.nj.gov. The subject of the email should reference the RFQ title, and all documents should be included in the submission email.

Issue Date: January 25, 2024

Bid Solicitation Issued By:

State of New Jersey
Department of the Treasury
Division of Investment
Trenton, New Jersey 08625-0230

Using Agency/Agencies:

State of New Jersey
Division of Investment
50 West State Street, 9th Floor
Trenton, NJ 08625

Table of Contents

1.0	SCOPE OF WORK.....	3
1.1	REGISTRATION.....	3
1.2	EVENT MARKETING	4
1.3	TECHNOLOGY	4
1.4	SERVICE AND SUPPORT	4
1.5	FORMS, REGISTRATIONS AND CERTIFICATIONS TO BE SUBMITTED WITH QUOTE ...	5
1.5.1	OFFER AND ACCEPTANCE PAGE.....	5
1.5.2	OWNERSHIP DISCLOSURE FORM.....	5
1.5.3	DISCLOSURE OF INVESTMENT ACTIVITIES IN IRAN FORM.....	6
1.5.4	DISCLOSURE OF INVESTIGATIONS AND OTHER ACTIONS INVOLVING BIDDER FORM 6	6
1.5.5	MACBRIDE PRINCIPLES FORM.....	6
1.5.6	SERVICE PERFORMANCE WITHIN THE UNITED STATES	6
1.5.7	SUBCONTRACTOR UTILIZATION PLAN	7
1.5.8	PAY TO PLAY PROHIBITIONS	7
1.5.9	AFFIRMATIVE ACTION.....	7
1.5.10	STATE OF NEW JERSEY SECURITY DUE DILIGENCE THIRD-PARTY INFORMATION SECURITY QUESTIONNAIRE	8
1.5.11	BUSINESS REGISTRATION	8
1.5.12	CERTIFICATION OF NON-INVOLVEMENT IN PROHIBITED ACTIVITIES IN RUSSIA OR BELARUS PURSUANT TO P.L.2022, C3.....	8
1.6	COST.....	10
1.6.1	PRICE SHEET.....	10

1.0 SCOPE OF WORK

This Section is intended to describe the general nature and level of work being performed by the chosen Contractor. The foregoing is not to be construed as an exhaustive list of all responsibilities, duties, and skills required and there may be requirements to perform duties outside of those listed below on an occasional and ad hoc basis.

The selected Contractor shall work with the State of New Jersey Division of Investment (DOI) to plan in partnership with the Department of the Treasury, The Private Markets Emerging Manager Symposium (EM Symposium), which is a one (1) day virtual/hybrid event scheduled to take place between June and October of calendar year 2024. The Contractor shall manage the execution of all aspects of the EM Symposium, including technology platform development, planning, running day of the event, overall event management logistics, programming, and implementation. Responsibilities also include coordinating speakers, and presenters, and providing customer support in a virtual setting. The Contractor shall provide a turnkey solution, with a single vendor handling the technology platform and required professional services.

The Contractor shall respond within 12 hours to queries from DOI on weekdays, Monday to Friday.

The Vendor shall be the primary contact regarding project updates, questions, and issues concerning processes and procedures related to the event.

1.1 REGISTRATION

The Contractor shall provide a seamless, fully-branded experience at each step of the virtual event lifecycle including registration, email marketing, and content management.

The Contractor shall ensure the following:

- A. That all components of pre-event registration management are facilitated;
- B. An internet-based registration system is coordinated which can accommodate customized functionality, and general attendee online registration;
- C. A website portal registration is created specifically for attendees to register their attendance. The website shall include an automated confirmation application that provides the attendee a same-day confirmation notification to include pertinent data submitted and required for event attendance;
- D. The website portal should be user friendly;
- E. The website registration portal must be fully tested and ready to go live no later than 45 days before the date of the EM Symposium;
- F. A technology security plan that includes system backup, data integrity, and cyber security shall be provided; and
- G. All data, records, and reports relating to the EM Symposium registration database, shall be treated by the Contractor and its subcontractors as the exclusive property of the DOI.

1.2 EVENT MARKETING

The Contractor shall create marketing materials to promote the event, including pre-event outreach information about the program, venue and registration. It is the intent of this RFQ to establish a successful event, which should be able to accommodate approximately 1,000 participants in a virtual capacity.

The Contractor shall create and secure an EM Symposium Website to drive registration and increase participation across the investment industry.

1.3 TECHNOLOGY

The Contractor shall be required to deliver high-quality, secure event content (whether live, simulated, or on-demand) to any participant globally, and on any device to accommodate approximately 1,000 virtual participants.

The solution shall provide the following functionality:

- A. Provide a pre-registration event portal, accessible via desktop (windows/mac OS) web browser and mobile device (iOS and Android);
- B. Provide ad-hoc reporting on event registration statistics leading up the event, as requested by the DOI in MS Excel format;
- C. Provide green room functionality for presenters and speakers;
- D. Provide breakout rooms with technical assistance available in the event of issues with participants audio and/or video;
- E. Ability to handle MS PowerPoint presentations and pre-recorded video;
- F. Ability for investment managers and event participants to upload their presentation decks and/or other documents into the portal. Additionally, when uploading decks/documents, the participant should be required to select an asset class (i.e., private equity, private credit, real estate, or real assets) so materials are saved in asset class folders for easy access;
- G. Ability to transition from live camera feeds to pre-recorded video throughout the lifecycle of the event; and
- H. Provide a recording of the entire event, including breakout sessions that are available for playback after the event. Participants should be required to provide identification information prior to having access to replay the event.

1.4 SERVICE AND SUPPORT

The Contractor shall be responsible for coordination, preparation, and execution of the virtual event. Additional responsibilities include but are not limited to:

- A. Symposium pre-planning, configuration, and coordination;
- B. "Run of show" the day of the event – providing the necessary director, production, and technical crew necessary to support the draft virtual event structure (see Attachment 1);

- C. Provide end-user support to participants, speakers, presenters and internal DOI staff, as required for the duration of the event;
- D. Meetings with DOI staff responsible for the event to identify needs and clarify expected outcomes;
- E. Keeping identified DOI staff or representatives informed of event status and issues;
- F. EM Symposium Kick-Off Meeting with DOI staff;
- G. Provide live support staff during the event, and during normal business hours leading up to the event via telephone, chat, and email; and
- H. Provide a detailed list of deliverables that DOI will need to provide to the vendor (including choices of theme, colors, font, etc.) together with a schedule for when these deliverables are required by the contractor.

1.5 FORMS, REGISTRATIONS AND CERTIFICATIONS TO BE SUBMITTED WITH QUOTE

A Bidder is required to complete and submit the following forms. As an alternative to uploading certain forms with the submitted Quote, a Bidder may complete several certifications electronically in [NJSTART](#) on the “Terms and Categories” Tab within the Vendor Profile. Those forms that may be completed on the [NJSTART](#) “Terms and Categories” Tab are noted below. Additionally, a Bidder may attach completed forms to the Vendor Profile. Refer to [VENDOR QUICK REFERENCE GUIDES](#) (QRGs) “Vendor Forms” and “Attaching Files” for additional instructions.

1.5.1 OFFER AND ACCEPTANCE PAGE

The Bidder should complete and submit the Offer and Acceptance Page with the Quote. The Offer and Acceptance Page must be signed by an authorized representative of the Bidder. If a Bidder does not submit the form with the Quote, the Bidder must comply within seven (7) business days of the State’s request or the State may deem the Quote non-responsive.

1.5.2 OWNERSHIP DISCLOSURE FORM

Pursuant to N.J.S.A. 52:25-24.2, in the event the Bidder is a corporation, partnership or limited liability company, the Bidder must disclose all 10% or greater owners by (a) completing and submitting the Ownership Disclosure Form with the Quote; (b) if the Bidder has submitted a signed and accurate Ownership Disclosure Form dated and received no more than six (6) months prior to the Quote submission deadline for this procurement, the Division may rely upon that form; however, if there has been a change in ownership within the last six (6) months, a new Ownership Disclosure Form must be completed, signed and submitted with the Quote; or, (c) a Bidder with any direct or indirect parent entity which is publicly traded may submit the name and address of each publicly traded entity and the name and address of each person that holds a 10 percent or greater beneficial interest in the publicly traded entity as of the last annual filing with the federal Securities and Exchange Commission or the foreign equivalent, and, if there is any person that holds a 10 percent or greater beneficial interest, also shall submit links to the websites containing the last annual filings with the federal Securities and Exchange Commission or the foreign equivalent and the relevant page numbers of the filings that contain the information on each person that holds a 10 percent or greater beneficial interest. N.J.S.A. 52:25-24.2.

NOTE: In lieu of completing and submitting the paper-based form, the Bidder has the option to complete this form online in [NJSTART](#) on the “Terms and Categories” Tab.

A Bidder's failure to submit the information required by N.J.S.A. 52:25-24.2 will result in the rejection of the Quote as non-responsive and preclude the award of a Contract to said Bidder.

1.5.3 DISCLOSURE OF INVESTMENT ACTIVITIES IN IRAN FORM

The Bidder should submit Disclosure of Investment Activities in Iran form to certify that, pursuant to N.J.S.A. 52:32-58, neither the Bidder, nor one (1) of its parents, subsidiaries, and/or affiliates (as defined in N.J.S.A. 52:32-56(e)(3)), is listed on the Department of the Treasury's List of Persons or Entities Engaging in Prohibited Investment Activities in Iran and that neither the Bidder, nor one (1) of its parents, subsidiaries, and/or affiliates, is involved in any of the investment activities set forth in N.J.S.A. 52:32-56(f). If the Bidder is unable to so certify, the Bidder shall provide a detailed and precise description of such activities as directed on the form. If a Bidder does not submit the form with the Quote, the Bidder must comply within seven (7) business days of the State's request or the State may deem the Quote non-responsive.

NOTE: In lieu of completing and submitting the paper-based form, the Bidder has the option to complete this certification online in **NJSTART** on the "Terms and Categories" Tab.

1.5.4 DISCLOSURE OF INVESTIGATIONS AND OTHER ACTIONS INVOLVING BIDDER FORM

The Bidder should submit the Disclosure of Investigations and Other Actions Involving Bidder Form, with its Quote, to provide a detailed description of any investigation, litigation, including administrative complaints or other administrative proceedings, involving any public sector clients during the past five (5) years, including the nature and status of the investigation, and, for any litigation, the caption of the action, a brief description of the action, the date of inception, current status, and, if applicable, disposition. If a Bidder does not submit the form with the Quote, the Bidder must comply within seven (7) business days of the State's request or the State may deem the Quote non-responsive.

NOTE: In lieu of completing and submitting the paper-based form, the Bidder has the option to complete this certification online in **NJSTART** on the "Terms and Categories" Tab.

1.5.5 MACBRIDE PRINCIPLES FORM

The Bidder should submit the MacBride Principles Form. Pursuant to N.J.S.A. 52:34-12.2, a Bidder is required to certify that it either has no ongoing business activities in Northern Ireland and does not maintain a physical presence therein or that it will take lawful steps in good faith to conduct any business operations it has in Northern Ireland in accordance with the MacBride principles of nondiscrimination in employment as set forth in N.J.S.A. 52:18A-89.5 and in conformance with the United Kingdom's Fair Employment (Northern Ireland) Act of 1989, and permit independent monitoring of their compliance with those principles. If a Bidder does not submit the form with the Quote, the Bidder must comply within seven (7) business days of the State's request or the State may deem the Quote non-responsive.

NOTE: In lieu of completing and submitting the paper-based form, the Bidder has the option to complete this certification online in **NJSTART** on the "Terms and Categories" Tab.

1.5.6 SERVICE PERFORMANCE WITHIN THE UNITED STATES

The Bidder should submit a completed Source Disclosure Form. Pursuant to N.J.S.A. 52:34-13.2, all Contracts primarily for services shall be performed within the United States. If a Bidder does not submit the form with the Quote, the Bidder must comply within seven (7) business days of the State's request or the State may deem the Quote non-responsive.

1.5.7 SUBCONTRACTOR UTILIZATION PLAN

Bidders intending to use Subcontractor(s) shall list all subcontractors on the Subcontractor Utilization Plan form or may list the Subcontractor(s) on the “Subcontractor” Tab in **NJSTART**.

For a Quote that does NOT include the use of any Subcontractors, the Bidder is automatically certifying that, if selected for an award, the Bidder will be performing all work required by the Contract.

If it becomes necessary for the Contractor to substitute a Subcontractor, add a Subcontractor, or substitute its own staff for a Subcontractor, the Contractor will identify the proposed new Subcontractor or staff member(s) and the work to be performed. The Contractor shall forward a written request to substitute or add a Subcontractor or to substitute its own staff for a Subcontractor to the State Contract Manager for consideration. The Contractor must provide a completed Subcontractor Utilization Plan, a detailed justification documenting the necessity for the substitution or addition, and resumes of its proposed replacement staff or of the proposed Subcontractor’s management, supervisory, and other key personnel that demonstrate knowledge, ability and experience relevant to that part of the work which the Subcontractor is to undertake. The qualifications and experience of the replacement(s) must equal or exceed those of similar personnel proposed by the Contractor in its Quote. The State Contract Manager will forward the request to the Director for approval.

NOTE: No substituted or additional Subcontractors are authorized to begin work until the Contractor has received written approval from the Director.

1.5.8 PAY TO PLAY PROHIBITIONS

Pursuant to N.J.S.A. 19:44A-20.13 et seq. (P.L. 2005, c. 51), the State shall not enter into a Contract to procure services or any material, supplies or equipment, or to acquire, sell, or lease any land or building from any Business Entity, where the value of the transaction exceeds \$17,500, if that Business Entity has solicited or made any contribution of money, or pledge of contribution, including in-kind contributions, to a candidate committee and/or election fund of any candidate for or holder of the public office of Governor or Lieutenant Governor, to any State, county, municipal political party committee, or to any legislative leadership committee during certain specified time periods.

Prior to awarding any Contract or agreement to any Business Entity, the Business Entity proposed as the intended Contractor of the Contract shall submit the Two-Year Chapter 51/Executive Order 117 Vendor Certification and Disclosure of Political Contributions form, certifying that no contributions prohibited by either Chapter 51 or Executive Order No. 117 have been made by the Business Entity and reporting all qualifying contributions made by the Business Entity or any person or entity whose contributions are attributable to the Business Entity. Failure to submit the required forms will preclude award of a Contract under this Bid Solicitation.

Further, the Contractor is required, on a continuing basis, to report any contributions it makes during the term of the Contract, and any extension(s) thereof, at the time any such contribution is made.

1.5.9 AFFIRMATIVE ACTION

The intended Contractor and its named Subcontractor(s) must submit a copy of a New Jersey Certificate of Employee Information Report, or a copy of Federal Letter of Approval verifying it is

operating under a federally approved or sanctioned Affirmative Action program. If the Contractor and/or its named Subcontractor(s) are not in possession of either a New Jersey Certificate of Employee Information Report or a Federal Letter of Approval, it/they must complete and submit the Affirmative Action Employee Information Report (AA-302). Information, instruction and the application are available at https://www.state.nj.us/treasury/contract_compliance/index.shtml.

1.5.10 STATE OF NEW JERSEY SECURITY DUE DILIGENCE THIRD-PARTY INFORMATION SECURITY QUESTIONNAIRE

The Bidder should complete and submit the State of New Jersey Security Due Diligence Third-Party Information Security Questionnaire (Questionnaire) with its Quote. If a Bidder does not submit the completed Questionnaire with the Quote, the Bidder must comply within seven (7) business days of the State's request, or the State may deem the Quote non-responsive.

This Questionnaire is designed to provide the State with an overview of the Bidder's security and privacy controls to ensure that the Bidder will (1) meet the State of New Jersey's objectives as outlined and documented in the Statewide Information Security Manual; and (2) comply with the State's security requirements as outlined in *Section 6 – Data Security Requirements – Contractor Responsibility*. The State reserves the right to remove a Bidder from consideration of Contract award if the State determines that the Bidder's Questionnaire failed to sufficiently convey that the Bidder's security and privacy controls meet the State's requirements.

The State has executed a Confidentiality/Non-Disclosure Agreement which is attached to the Questionnaire. The Bidder should countersign the Confidentiality/Non-Disclosure Agreement and include it with its submitted Questionnaire. If a Bidder does not submit the signed Confidentiality/Non-Disclosure Agreement with the Questionnaire, the Bidder must comply within seven (7) business days of the State's request, or the State may deem the Quote non-responsive. No amendments to the Confidentiality/Non-Disclosure Agreement are permitted.

To the extent permissible under OPRA, the New Jersey common law right to know, and any other lawful document request or subpoena, the completed Questionnaire and supplemental documentation provided by the Bidder will be kept confidential and not shared with the public or other Bidders.

1.5.11 BUSINESS REGISTRATION

In accordance with N.J.S.A. 52:32-44(b), a Bidder and its named Subcontractors must have a valid Business Registration Certificate ("BRC") issued by the Department of the Treasury, Division of Revenue and Enterprise Services prior to the award of a Contract. A Bidder should verify its Business Registration Certification Active status on the "Maintain Terms and Categories" Tab within its profile in *NJSTART*. In the event of an issue with a Bidder's Business Registration Certification Active status, *NJSTART* provides a link to take corrective action.

1.5.12 CERTIFICATION OF NON-INVOLVEMENT IN PROHIBITED ACTIVITIES IN RUSSIA OR BELARUS PURSUANT TO P.L.2022, C3

The Bidder should submit Certification of Non-Involvement in Prohibited Activities in Russia or Belarus Pursuant to P.L.2022, c.3 (Attachment 2). Pursuant to P.L.2022, c.3, a person or entity seeking to enter into or renew a contract for the provision of goods or services shall certify that it is not Engaging in Prohibited Activities in Russia or Belarus as defined by P.L.2022, c.3, sec. 1(c). If the Contractor is unable to so certify, the Contractor shall provide a detailed and precise description of such activities.

If you certify that the Bidder is engaged in activities prohibited by P.L.2022, c.3, the Bidder shall have 90 days to cease engaging in any prohibited activities and on or before the 90th day after

this certification, shall provide an updated certification. If the Bidder does not provide the updated certification or at that time cannot certify on behalf of the entity that it is not engaged in prohibited activities, the State shall not award the business entity any contracts, renew any contracts, and shall be required to terminate any contract(s) the business entity holds with the State that were issued on or after the effective date of P.L.2022, c.3.

NOTE: The following forms are not available through NJSTART:

1. [Standard](#) and [Waivered T&Cs](#);
2. [Chapter 271 Vendor Certification and Political Disclosure Form](#); and
3. Certificate of Insurance/ACORD list DOI. First, the certificate holder should be the State of New Jersey, DOI, 50 W State Street, 9th Fl, PO Box 290, Trenton, NJ 08608. Second, we need certain language in the description. "The State of New Jersey, its officers and employees, and Authorized Purchasers are included as Additional Insureds with respect to the Commercial General Liability and Automobile Liability coverages as required by written contract."

1.6 COST

The Contractor shall provide firm-fixed pricing for all price lines in Section 1.6.1 price sheet. Failure to provide pricing for all price lines may deem a Vendor's proposal non-responsive to the RFQ requirements.

1.6.1 PRICE SHEET

Technology Platform:

Priceline	Cost
Priceline 1: Event Management Platform	
Priceline 2: Virtual registration portal/fee per user (or flat rate)	
Priceline 3: Attendee Licenses	

Support Services:

Priceline	Cost
Priceline 4: Event Project Management (Director, Production Crew, etc.)	
Priceline 5: Event Session Webcast Support	
Priceline 6: Platform buildout and configuration	
Priceline 7: Speaker green room liaison and breakout room support	
Priceline 8: Event marketing and promotional design and distribution	