

Cain Center for the Arts

Request for proposal

Customer relationship management and ticketed sales system

{Date of publication}

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Overview

Background

At Cain Center for the Arts, we're creating a stronger community through the power of the arts. Our vision is simple: we want to empower children and adults alike to create, experience, and enjoy the arts, right here in the heart of the region where they live, work, and play. Making the arts accessible and relevant for everyone is central to the mission of Cain Center for the Arts. As the region's only public arts and community center, Cain Center for the Arts will offer performance, education, gallery, and community spaces designed to be beautiful, flexible, and close to home for the more than 300,000 residents of the Lake Norman North Carolina region.

Cain Center for the Arts will be a catalyst for creativity in our region, a home for inspiration that touches people of all ages and every walk of life. Arts education is an essential component of the Cain Center's commitment to the community. We are committed to making the arts a convenient and day-to-day part of life in the Lake Norman region. Our goal is to provide common experiences that create social capital, nurture a sense of community, and enrich people from every walk of life.

Our facility, currently under construction and scheduled for grand opening in September 2022, includes a 400-seat theatre, gallery space, event space, 3 classrooms, a community green space, and an outdoor plaza. The space will house national touring companies, world-renowned entertainers, local productions, and grassroots performers, along with educational workshops, classes, and camps.

Objective

Purchase a comprehensive customer relationship management, donor & member management, and ticket issuing system to handle public, private, member, and group events, along with classes, workshops, and camps.

Process outline

RFP response timeline

December 1, 2021	RFP Released
January 3, 2022	RFP Questions Deadline - Email questions to sarah.e.goodson@gmail.com
January 26, 2022	RFP Questions Answered
February 4, 2022	RFP Submission Deadline - Email submission to sarah.e.goodson@gmail.com

Demonstrations

Product demonstrations will be scheduled between February 1, 2022 and February 4, 2022.

Vendor / product selection

Target vendor and product selection Negotiations and final recommendations February 7 -15, 2022

Executive Committee February 17

Full Board proposal and ratification February 22

Target contract finalization by February 23, 2022.

Implementation

March 1, 2022 Target Implementation Start Date

May 1, 2022 Target Go-Live Date (selling tickets in the new system)

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Additional information

Event Information and Annual Sales Volume

We are anticipating 25-35 events/performances annually housed in our 400-seat theatre. The anticipated average ticket price will be \$35.00 to \$55.00.

Ticketed rentals ## in our 400-seat theatre and variable average ticket price.

We anticipate offering ## of classes and workshops annually with an average price of \$100.00 per registration.

We anticipate offering ## of gallery exhibits annually that will be free to the public.

We anticipate offering ## of special events annually with an average price of \$\$.

Development Information

Applicable data for the previous three (3) years.

Year	# of donations	Total donations (\$)	# of memberships	Total membership value (\$)

Venue information

Venue	Capacity	Use	Configuration	# of Layouts
Cain Center Theatre	400	Live Performances	General Admission Reserved Seating Combo GA/Reserved Reserved Tables	Minimum of 5
Cain Center Gallery		Art Exhibits	General Admission	1
Cain Center Classrooms		Workshops/Classes/	General Admission	7

Camps			
Event Space	Special Events / Outdoor Events	General Admission	2
Cornelius Arts Center Gallery	Art Exhibits / Special Events	General Admission	2

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System users

The typical number of unique and concurrent system users:

User Type	# of Users
System Admin	1
Development	2
Marketing / Content Management / Web Design	2
Reports Only	2
Accounting	1
Sales Agents	5
Volunteer Management	2

Current system information

Customer Relationship Management

- Civic Rec

Ticketing

- Civic Rec

Fundraising

- Neon

Marketing

- Email Marketing: Mail Chimp
- Website: WordPress

Payment Gateway and Payment Processor

- United Community Bank

Anticipated system venue management system like Prism

System requirements

The below features are listed as either mandatory or preferred (M or P). Supplier should include in their response if they do or do not support the requirement (Y or N), if it is a current system feature or planned for future deployment (C or F), and if set for future deployment what is the date the feature will be released.

1. CRM

Feature	Mandatory or Preferred (M or P)	Supplier Response Yes, No, Current, Future & Date for Future Deployment (Y, N, C, F)	Supplier Comments
1.1 Ability to manage customer relationships and households	M		
1.2 Ability to use wildcard searches for customer records	M		
1.3 Ability to manage city and state selection lists	M		
1.4 Ability to review customer purchase history easily	M		
1.5 Search for duplicate records and easily merge	M		
1.6 Record and report on a variety of customer data points	M		
1.7 Easily search for and choose existing customers during the administrative sale process	M		

2. Sales

Feature	Mandatory or Preferred (M or P)	Supplier Response Yes, No, Current, Future & Date for Future Deployment (Y, N, C, F)	Supplier Comments
2.1 Ability to sell events, memberships, series/seasons, sponsorships, donations, merchandise, and gift vouchers in a single order	M		
2.2 Allow for use of standard payment methods	M		
2.3 Ability to process multiple payment methods on a	M		

single order			
2.4 Ability to apply down payments and report on outstanding balances	M		
2.5 Ability to give early access to members, or fan clubs	M		
2.6 Ability to give access to special seat inventory to members or fan clubs	M		
2.7 Ability to do credit card presales such as AMEX	P		
2.8 Ability to refund to a customer account for future use, or to convert to donation	P		
2.9 Ability for consumers to use any device for purchases, smartphone, tablet, desktop including the ability to pick reserved seats	M		
2.10 Ability to take over the sale of seats in a web consumer's cart	P		

3. Memberships and packages

Feature	Mandatory or Preferred (M or P)	Supplier Response Yes, No, Current, Future & Date for Future Deployment (Y, N, C, F)	Supplier Comments
3.1 Ability to easily sell memberships	M		
3.2 Ability to automaticity renew subscriptions	M		
3.3 Ability to easily sell flexible packages and redeem in a single transaction	M		
3.4 Allow customers to complete/pay for renewals through a consumer portal	M		
3.5 Auto-renewal options for memberships	M		

4. Event and venue management

Feature	Mandatory or Preferred (M or P)	Supplier Response Yes, No, Current, Future & Date for Future Deployment (Y, N, C, F)	Supplier Comments
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4.1 Ability to create event templates for easy creating of events	P		
4.2 Ability to create and manage price and hold templates	M		
4.3 Ability to easily adjust price tiers at any time, even when the event is already on sale	M		
4.4 Ability to put seats on hold	M		
4.5 Ability to put seats on hold for a particular customer	P		
4.6 Ability to remove seats from a chart on an event-by-event basis	M		
4.7 Ability to create custom-branded order confirmations	M		
4.8 Ability to create custom-branded pre-event emails	M		
4.9 Ability to create custom-branded post-event emails based on scanned in status	M		
4.10 Ability to manage group sales, set aside inventory, process with down payments, remove, or add seats to the order	M		
4.11 Ability to allow individuals in a group to buy their own seats from a reserved inventory	P		
4.12 Ability for customers and back-office to easily exchange tickets and track activity	M		
4.13 Discount code management providing customer max and code max options	M		
4.14 Control ticket prices including the ability to create facility fees, and per ticket fees based on point of purchase and sales tax	M		

5. Access control

Feature	Mandatory or Preferred (M or P)	Supplier Response Yes, No, Current, Future & Date for Future Deployment (Y, N, C, F)	Supplier Comments
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5.1 Allow standard ticket delivery methods, as well as the option to enable mobile delivery.	M		
5.2 Allow integrated access control, and the system must support wireless devices to scan and validate barcoded tickets.	M		
5.3 Attendance tracking without barcode scanning	P		

6. Donations

Feature	Mandatory or Preferred (M or P)	Supplier Response Yes, No, Current, Future & Date for Future Deployment (Y, N, C, F)	Supplier Comments
6.1 Ability to collect donations, including automatically recurring donations	M		
6.2 Ability to process donations, tickets, and other items such as parking/concessions in the same transaction	M		
6.3 Ability to issue itemized receipts suitable for tax reporting	P		
6.4 Ability to create and track pledges	M		
6.5 Ability to apply and track soft credits	P		
6.6 Ability to tag customers with a track and readiness	P		
6.7 Ability to record conversations and interactions	P		
6.8 Ability to schedule and manage future interaction or asks	P		
6.9 Ability to email and/or mail branded customizable donation acknowledgments	M		

7. Marketing

Feature	Mandatory or Preferred (M or P)	Supplier Response Yes, No, Current, Future & Date for Future Deployment (Y, N, C, F)	Supplier Comments
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7.1	Integration with an email marketing tool	M		
7.2	Ability to fully brand and customize online product sales channel	M		
7.3	Ability to track web activity, including click-through and fall-off rates with Google Tag Manager	M		
7.4	Ability to mine existing customer data using “and” “or” and “exclude” operators to identify new marketing opportunities	M		

8. Reporting

Feature	Mandatory or Preferred (M or P)	Supplier Response Yes, No, Current, Future & Date for Future Deployment (Y, N, C, F)	Supplier Comments
8.1	Easily pull an event settlement report	M	
8.2	Easily pull a financial report	M	
8.3	Easily create custom reports	M	
8.4	Schedule reports to be run and emailed	M	
8.5	Export data to CSV or Excel	M	
8.6	Report by transaction date or event date	M	
8.7	Agent balance report	P	
8.8	Ability to report total sales and current availability across all events	M	
8.9	Report on each price point including full-price and discount or comp tickets	M	
8.10	Gift card tracking and reporting	P	
8.11	Outstanding balance reporting	M	

9. System

Feature	Mandatory or Preferred (M or P)	Supplier Response Yes, No, Current, Future & Date for Future Deployment	Supplier Comments
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		(Y, N, C, F)	
9.1 Ability to assign role-based user security profiles	M		
9.2 Remote administration via a web browser	M		
9.3 PCI compliant	M		
9.4 Multiple gateway processor options	P		
9.5 Ability for supplier to be merchant of record	M		
9.6 Ability to sell all products on these sale channels; ticket office, internet, and mobile devices.	M		
9.7 Easy to use intuitive interface	M		
9.8 Agent balance report	P		
9.9 Ability to report total sales and current availability across all events	M		
9.10 Report on each price point including full-price and discount or comp tickets	M		
9.11 Gift card tracking and reporting	P		
9.12 Outstanding balance reporting	M		

Questions

Technical Questions

1. What formats are supported for exporting data?
2. What formats are supported for importing data?
3. Does the product support all major modern browsers? (IE, Firefox, Safari, Chrome)
4. What ticket and/or paper printers does the product function well with?
5. What ticket scanners are preferred for your system?
6. How long does a typical walk-up, general admission sale take, in seconds?
7. If the system prevents leaving single seats, describe the ticket selection process.
8. Describe any CRM-type marketing tools that are part of the standard product, including email, pre- and post-event follow-up, surveys, donor management, etc.
9. If patrons have access to their own profiles online, what can they see?
10. Describe social network (Facebook, Twitter, etc.) tie-ins, interfaces.
11. Describe how the product is designed for mobility. Responsive design? Native applications?
12. How many concurrent user logins are included with standard product?
13. How many named user logins are included with standard product?
14. Describe the process to modify visible seating charts per event.
15. Describe how building seating maps, scaling seat maps, and dealing with seat holds and kills works in your solution and give specific examples. Additionally, what is the process and any cost associated with multiple seat configurations or scaling for one venue.
16. Describe options available for database and application server hosting. Does the system need to be installed on Cain Center servers and run from thick or thin clients or can it be run entirely in the Internet cloud using internet browsers on workstations, iPads, smart phones, etc.?
17. How many misc. fees can be added to a ticket sale? Are any fees set by system?
18. Describe what is required to print tickets in the ticket office, including types of printers, ticket stock requirements, etc.
19. Describe online web page creation process, indicating whether pages visible before "Buy Ticket" are created in your software or by our own web developers.
20. Can the look and feel of your solution be adapted to our branding design, and be branded to multiple designs for different community organizations while still pulling from one database? Additionally, can the individually branded pages only display events specific to that department/organization?
21. Describe approach to accessibility compliance.
22. Describe any event staff scheduling functionality, if included or optional.
23. Describe any form building functionality, if included or optional.

Integration Questions

1. Can the system integrate with WordPress?
 - a. If yes, describe integration capabilities and processes.
 - b. If not, describe other methods of website integration.
2. What SMTP environments will your solution integrate with? Special SMTP requirements?
 - a. Does the system integrate with any email marketing solutions (Benchmark, Constant Contact, Mailchimp, etc.)? If so, describe specifics.
3. What other technical integrations must we also consider integrating your solution?

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Ticket Inventory Questions

The Ticket Office Director and/or other ticket office employees with proper authority should be able to do the following. Please describe how each is accomplished:

1. Issue ticket holds
2. Kill/make seats unavailable for sale
3. Issue complimentary tickets
4. Reserve seats to be paid for later
5. Issue refunds or credits
6. Exchange tickets
7. Control inventory available for internet sales
8. Do you have paperless ticketing capabilities?

Event Set Up Questions

Please explain how the event is set up. Include the following points:

1. Can set up be done by the Supplier if needed?
2. Can set up be done by ticket office staff if desired?
3. Where are seating maps stored and how are they created?
4. If featured, where are "view from seat" photos stored?
5. Can events be set up in as little as one (1) day in advance of ticket sales?
6. Can event details be changed after tickets go on sale?

Reporting Questions

Supplier shall submit sample reports/products of the following documents:

1. Attach list of existing stock/canned reports.
2. Explain how ad hoc and/or custom reports are generated and saved for future use. Indicate whether third-party, extra-cost reporting tools are required or recommended.
3. Attendance sales and customer reports of tickets scanned
4. Sales Report for an individual event
5. Details Sales Report for a multi-performance event
6. Method of Payment report that includes number of tickets by price code and Method of Payment
7. User Reconciliation Report
8. Daily Sales Report
9. Weekly Sales Report utilizing General Ledger entries
10. Sales comparison/projections/trends report
11. Sample formatted ticket, online and ticket office
12. Sample customer receipt, online and ticket office
13. Sample credit card receipt, online and ticket office

Service and Support Questions

1. Where is the primary location of the service organization directly responsible for maintaining the Ticketing System and the service area covered?
2. What is the total number of service representatives operating from the primary location who are trained on the system proposed and will be responding to the Cain Center's service calls?
3. What is the minimum training/certification level required for service technicians?
4. What is the guaranteed response time for service?
5. Is there a charge for expedited service?
6. How frequently are revisions and updates to software released? Is there a pre-set schedule? Is there a customer forum for feedback?
7. How does a customer submit/get approved product enhancements to be incorporated into the base product?
8. Describe the avenues the Cain Center can participate in to influence the development of your products.
9. Can the Cain Center maintain an adequate test/training environment?
 - a. How will the test environment be refreshed and how often is the refresh of data?
10. Describe your training programs and their costs (at time of purchase and after for retraining and/or follow-up)?
11. What training is included in your proposal?
12. Describe your support agreements?
 - a. Include all support options for the Cain Center to consider in your proposal?
13. Describe Quality Assurance practices surrounding product releases.
14. Describe Supplier's future development plans roadmap regarding new feature releases, new technology implementation, and projected lifecycle of the current product. Describe in detail each newly planned feature for the next 12 months.
15. Give an overview of how product pricing is determined, e.g., per ticket, per total quantity tickets sold, per total ticket value, initial charge with annual maintenance or any combination of above.

Security and Infrastructure Questions

1. Are there special network requirements? What firewall or DNS requests are expected?
2. What other security measures are required or recommended for your solution?
3. Will you indemnify Cain Center and be fully responsible for any security breach of your solutions that is outside of Cain Center's control? If available, include that language in your response.
4. SAAS or On Premise or Cloud?
 - a. Does Cain Center need to host your solution?
 - i. If no –

1. What are your SLA options for all types of availability?
2. Describe your architecture for high availability?
 - a. High availability is required. How many 9's is your solution supporting?
3. How do you define "uptime" and "downtime"?
 - a. Describe estimated "uptime"
 - b. Do you guarantee the "uptime"?
4. Are there planned maintenance windows, or is the system available 7x24?
5. Describe what you define as "force majeure" events and how they affect your SLA.
6. Where are your data centers located?
7. Describe what you support and any support requirements for the Cain Center IT personnel.
8. Describe your network security
9. Describe your data security
10. Describe your data storage
11. Describe your policies, procedure, notifications, and obligations in the case of a security breach at your facility.
12. Describe the handling of our information at the End of Agreement, or termination of the contract. Some issue that should be addressed are:
 - a. In the case of a business disruption such as a bankruptcy or business acquisition, are provisions made to hold the software in escrow so that the Cain Center could install and host the software ourselves.
 - b. Describe how the Cain Center can access and retrieve our data as part of the termination of our agreement. There should be guarantees that we will have access to our data.
13. Is the Cain Center able to perform an audit of your security policies and procedures?
14. Describe your disaster recovery procedures and how often you test them.

Ticket Access Control Hardware and Software Questions

Supplier shall recommend and price separately access control hardware and software. Please indicate as part of the proposal:

1. Details of capabilities
2. Type of scanners
3. Reporting tools

Implementation Questions

1. Describe implementation:
 - a. Process
 - b. Timeline/schedule
 - c. Resources required by your company
 - d. Resource needs by the Cain Center – all (functional, technical, etc.)
2. Describe what it would take to be 'LIVE' on your system by July 1, 2022. If this is not a reasonable timeline, what would the earliest be for an implementation of your solution?
3. Will there be an additional cost to implement your solution to meet the July 1, 2022 timeline?
4. Are there other implementation requirements?
5. What would make the implementation process as smooth and as easy as possible?
6. Do you have any implementation concerns?
7. Provide the names and resumes of the individuals that will be implementing your solution for our campus? Include 2-3 references of like institutions where they have completed like implementations.

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Contract Period and Renewal

The contract term is anticipated to be from July 1, 2022 to June 30, 2027 with either one (1) three (3) year renewal or three (3) one (1) year renewals. Any and all renewals are subject to satisfactory performance evaluations by the Cain Center and must be executed in advance by written instrument agreed to by both parties. All terms and conditions of the original agreement will remain in force for the renewal period.

Pricing

The Respondent's proposal shall include specific information based upon the following:

1. Pricing methodology (Type: perpetual license, subscription license, or other; Based upon: users, FTE, event, or other?)
2. Pricing of your proposal(s) – based upon line item and detail.
3. Include options for 1, 3, 5-year contract pricing terms
 - a. Is there a discount for multiple year payments?
 - b. Can this agreement be evergreen?
 - c. Are there any price increases?
4. What non recurring costs are associated with your solution (implementation, training, professional services – define and detail.)
5. Recurring costs – based upon what criteria (itemized/detailed)
6. Professional service rates, and other rates – note what is included in the proposal and what might be additional or future costs
7. Ongoing Maintenance Costs / Support call rates (describe what this is based upon)
8. Price/Costs of other offerings/services – provide specifics and details
9. What recommendations can you make to reduce the upfront and total cost of ownership of your proposed solution?

It is intended that there will be no additional costs than those outlined in this section. Please confirm or clarify.