



Proposal Response to Cain Center for the Arts  
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Morrisville, North Carolina 27560  
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919.780.8086

Cain Center for the Arts

# Request for proposal

Customer relationship management and ticketed sales system

Updated: December 20, 2021



# 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 the 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 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 9, 2021	RFP Released <i>*NOTE: updated RFP Released December 20, 2021</i>
January 14, 2022	RFP Questions Deadline - Email questions to <a href="mailto:sarah.e.goodson@gmail.com">sarah.e.goodson@gmail.com</a>
January 21, 2022	RFP Questions Answered
January 28, 2022	RFP Submission Deadline - Email submission to <a href="mailto:sarah.e.goodson@gmail.com">sarah.e.goodson@gmail.com</a>

### Demonstrations

Product demonstrations will be scheduled between February 8, 2022, and February 11, 2022.

### Vendor / product selection

February 14 -16, 2022	Target vendor and product selection, negotiations, and final recommendations
February 17, 2022	Recommendation presented to Cain Center Executive Committee
February 22, 2022	Recommendation presented to Cain Center Board for proposal and ratification
February 23, 2022	Target contract finalization

### Implementation

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

### Contact

All contact should be done in writing through email to Sarah Goodson, [sarah.e.goodson@gmail.com](mailto:sarah.e.goodson@gmail.com). Please include the name of your company and "Cain Center RFP" in the email subject line of any correspondence.

## Additional information

The Cain Center for the Arts requires a ticketing CRM system to meet its operational and business objectives. The ticketing system needs to have robust marketing automation functionality, development functionality, and venue management functionality, or the ability to integrate through an open API with external systems. It is required that the supplier act as the merchant and maintain level 1 PCI DSS compliance throughout the entirety of the contact with the Cain Center for the Arts.

### Event Information and Projected Sales Volume

- We anticipate 25-35 events/performances annually housed in our 400-seat theatre. The anticipated average ticket price will be \$35.00 to \$55.00. We anticipate 5 ticketed rentals in this space with a variable ticket price.
  - We anticipate a higher threshold for year one (1) due to community anticipation of the Cain Center for the Arts officially opening
  - After year one (1) we anticipate a 65% minimum threshold
- We anticipate offering 300 classes, workshops, and summer camps annually with an average price of \$100.00 per registration.
- We anticipate offering 5 of gallery exhibits annually that will be free to the public.

### Development Information

Applicable data for the previous three (3) years.

Year	# of donations	Total donations (\$)
FY22 to date	418	\$2,047,215
FY21	1409	\$3,825,387
FY20	429	\$2,064,867

**As of now we are not contemplating a membership program in the first year, but will likely implement one in the future. For unearned/contributed revenue, we are currently projecting about \$875,000 for FY23 and \$1,002,000 for FY24.** The Etix solution contains very robust Membership tools used by similar client organizations nationwide. We are happy to discuss this with you and share multiple options you can use.

### System users

We project the typical number of unique and concurrent system users to be: 15-20

### Current System Information

Customer Relationship Management

- Civic Rec

Ticketing

- Civic Rec

Fundraising

- Neon CRM

Marketing

- Email Marketing: Mail Chimp
- Website: WordPress

Payment Gateway and Payment Processor

- United Community Bank

## Ticketing Hardware

### The following ticketing hardware is required:

- Workstation Computers
- Credit Card Terminals
- Thermal Ticket Printer (Basic Tickets/Printing - Primary Delivery Method will be E-Tickets)
- Access Control Scanners

Etix is pleased to provide the ticketing and scanning hardware to the Cain Center for the Arts at no charge for the life of our partnership. This includes 2 laptops, up to 2 thermal ticket printers (Boca or Epson), peripherals, up to 3 credit card swipes, and up to 5 access control scanners. We are also happy to modify these should you need us to address any unique needs not clarified here.

## Response Formatting

Please submit original proposals and supporting documents via email with attachments or through a shared document cloud system (Dropbox, Google Drive, Microsoft OneDrive)

Responses should be limited to ten pages in length. Financial Proposals should be limited to a single page. Responses may not be rearranged, regrouped, or divided in any way. The response should contain the following sections:

- Section 1.** Cover Letter
- Section 2.** Financial Proposal
- Section 3.** References
- Section 4.** Response to Scope of Service

## Response Details

### **Section 1. Cover Letter:**

- 1.1. Executive Summary: Please include a brief description of the company's history, corporate structure, and expertise dealing with organizations of similar size, type, and scope.**
- 1.2. Proposal Summary: Please explain the scope of your proposal and your proposed services to Cain Center for the Arts,**
- 1.3. Contact name(s) and title(s) of the individual(s) responsible for the company's proposal and negotiation.**

Sarah Goodson  
Cain Center RFP  
Cain Center for the Arts  
Cornelius, NC  
[sarah.e.goodson@gmail.com](mailto:sarah.e.goodson@gmail.com)

Dear Sarah,

I am honored to submit this proposal for comprehensive ticketing services for the Cain Center for the Arts. I recognize that this opportunity provides a partnership with a world-class organization, and all of us at Etix look forward to becoming your partner for many years to come.

At Etix, we pride ourselves on our ability to empower our valued client partners through unsurpassed technology and services to acquire and develop a direct relationship with your patrons who attend the live events in your community. Etix is a privately held Raleigh, North Carolina-based company, employing professionals who live and support your community every day. We live here and proudly support the North Carolina performing arts communities where we live and work every day! For example, we are members of and sit on the Board of the North Carolina Presenters Consortium (NCPC). We produce, and Etix is a sponsor of, the ArtsMarket Conference held in Durham, NC. Our leadership team consists of our founder and Chairman, Travis Janovich, President, Paxton Badham, and a team of more than 250 experts serving many performing arts clients for many years; just like the Cain Center for the Arts.

We understand the importance of the relationship with your resident partners and patrons, the local, regional, and national citizens, and valued presenters who will undoubtedly visit and support the Cain Center for the Arts. Etix is built to maximize that touch, at all levels, as well as leverage industry-leading technology to make these partnerships wildly successful, relevant, interesting, and enjoyable. These are the cornerstones of our success – I am over the moon with excitement at the opportunity to elaborate all of these through this proposal AND personally as you review your options.

To this end, the overview of our partnership offer to the Cain Center for the Arts includes:

- No Etix Charges to you
- All equipment is included and guaranteed for the life of our partnership
- \$15,000 signing bonus and marketing dollars over a three-year term
- All client services, training and webinars, Etix Live registration, event creation, digital marketing, call center, and turnkey solutions are included at no charge
- Very low patron fees
- You can use your merchant processor and enjoy your cc rate OR use ours with a very competitive rate
- Attendance at Etix Live or Etix Blast annual training seminars including hotel and meals

Etix is celebrating our twenty-second successful year in computerized ticketing. Our client roster exceeds 4200 customers and we are firmly rooted in Raleigh and throughout the United States. We firmly believe that the relationship and branding your valued guests should encounter is with you; powered quietly in the background with Etix.



Core to our success are these guiding principles:

- We empower our clients; engage to assist and support you with world-class technology, private label marketing that drives your Cain Center for the Arts brand, deliver multi-faceted distribution to complement your box office locations through online, telephone, and client services - then we get out of the way of the relationship between you and your valued guests
- We only participate in opportunities that fit; thus ensuring that we remain true to our mission to serve you. We are extremely proud of our success with similar venues including:

UNC Greensboro - College for the Visual and Performing Arts  
 Charlotte Performing Arts Academy  
 Stranahan Theater  
 The Buddy Holly Hall  
 Wagner Noel Center  
 Orpheum Theatre Phoenix  
 Morris Performing Arts Center  
 Altria Theatre  
 Eastern Kentucky University Center for the Arts  
 Lowell Memorial Hall  
 Veterans Memorial Hall  
 Francis Marion University Performing Arts Center  
 Lakeland Cultural Arts Center  
 Oxnard Performing Arts Center  
 Berglund Performing Arts Center  
 Miller Theatre  
 Larcom Performing Arts Center  
 Nashua Performing Arts Center  
 Belle Mehus Auditorium  
 Redding Civic Auditorium

These clients all have similar requirements and joined our family with complex needs. We invite you to contact any of our references identified in our tender at your convenience. We believe you will find commonality among their feedback; specifically that:

- We focus on listening to the voice of the customer, both internal and external, to keep us focused on delivering the very best in technology and services and eliminating any gaps that currently exist.

I recognize that Cain Center for the Arts represents a landmark partnership that will have the eyes of our industry upon us. To this end, it is very important to me and the entire Etix family that you are completely confident that partnering here with me and the entire Etix family will result in every aspect of your ticketing experience being innovative and best – without exception. What better place and partner to provide all assets available in our arsenal to maximize results at one of our community's most iconic new venues!

Please allow me to just highlight a few points of interest:

- Everything we deliver today through our new partnership relative to software, marketing, equipment, and client support will always keep improving and be significantly the best in our industry year over year. Because we are a private company, we can provide this boutique level of service and touch and empower fresh technology in the most efficient ways.
- We realize that your valued citizens and guests must enjoy the greatest benefits from our partnership. These include, and are not limited to, low prices per transaction, more choices, better information, direct relationships with the community, more purchase locations, humans who answer the phone; professionals who live and work with the care for our community of clients and who recognize the value YOU deliver to the entire performing arts society.

Etix is a company that clients join and stay with for many years. Our employee average tenure exceeds nine years! Etix takes care of the people who serve you; that is a major part of what makes our company so terrific. We are ticketing professionals with hundreds of years combined experience with the passion to do everything it takes to give you the very best, at all levels, in services and support.

As you review our proposal, I welcome any questions you might have. I look forward to the opportunity to continue our discovery by meeting you and your resident partners to demonstrate our system and introduce the people who make Etix your best choice for the Cain Center for the Arts. We are completely prepared to go live when you are ready, and I will be directly involved from the outset with this relationship to ensure that we greatly exceed all aspects of services provided through our solutions and partnership.

My contact information is:

Dennis Scanlon  
Vice President  
919.780.8086  
dennis.scanlon@etix.com

Again, thank you for this opportunity and we look forward to a bright and successful relationship with the Cain Center for the Arts.

Sincerely,



Dennis Scanlon  
Vice President, Etix

**Section 2. Financial Proposal: It is intended that there will be no additional costs than those outlined in this section. In a single page, please detail your financial offer to Cain Center for the Arts, including the following details:**

- 2.1. Fees to Cain Center for the Arts: Please indicate which fees are fixed and which, if any, are variable – for example does the venue have an opportunity to increase convenience fees to cover unreimbursed event costs such as credit card fees?** Etix Fees for remote sales are per ticket and are variable based on the price of the ticket. You absolutely can increase fees at your discretion at any time. **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.** Etix pricing is based on each ticket sold online and through optional Telephone Sales through Etix. Etix charges no annual maintenance fees.
- 2.1.1. **Annual license Fee** - \$0 No charge
- 2.1.2. **Recurring & non recurring costs** - \$0 No Etix charge. The only recurring costs you will be responsible for would be optional credit card fees charged by the merchant processor.
- 2.1.3. **Professional services rates - note what is included in the proposal and what might be additional or future costs.** All professional services provided by Etix included here are provided at no additional charge to you throughout the life of our partnership.
- 2.1.4. **Ongoing maintenance costs/support call rates.** There are no charges for Etix support or maintenance services throughout the life of our partnership.
- 2.1.5. **What recommendations can you make to reduce the upfront and total cost of ownership of your proposed solution?** Our partnership paradigm is designed we only earn revenue when we help you sell tickets. To this end, we believe our solution virtually eliminates upfront and ongoing costs to you.
- 2.1.6. **Per ticket fees - No charge for box office tickets.** 10% of the face value of each ticket sold online or through our call center (should you choose to use our Telephone Sales Center), up to a maximum of \$5.00 per ticket. We are happy to discuss your thoughts here and welcome your feedback if you wish to modify this model.
- 2.1.7. **Per electronic ticket delivery** - No charge.
- 2.1.8. **Per ticket transfer** - No charge
- 2.1.9. **For Credit Card Processing (Visa, MC, Amex, Discover)** - You may elect to use your processor or use ours. If you use ours, we charge a blended rate of 3% for Visa, MC, Amex, and Discover.
- 2.2.** As part of your response to this section, specifically, including your ability to provide Cain Center for the Arts with venue controlled consumer charges at each point of sale:
- 2.2.1. **Per ticket** - Yes. The Cain Center for the Arts can control your per ticket fees and may add anything it wishes over and above the net Etix Fees detailed above.
- 2.2.2. **Per order** - Yes. The Cain Center may add anything it wishes over and above the net Etix Fees detailed above.
- 2.2.3. **Fulfillment** - Yes.
- 2.2.4. **Online renewal** - Yes.
- 2.2.5. **Miscellaneous items** - Yes.
- 2.3. Are there any shows, artists, or promoters that you have agreements with whose terms you are obligated to follow and may impact the standard ticketing agreement if you are awarded the contract at Cain Center for the Arts? If Yes, please explain.** Etix has no agreements that would supersede the Cain Center for the Arts agreement.
- 2.4. Financial Incentives for Cain Center for the Arts:**
- 2.4.1. **Signing Bonus?** Etix is pleased to provide a great signing bonus to the Cain Center for the Arts. Etix will provide the Cain Center for the Arts a signing bonus of five thousand dollars (**\$5,000**). As our industry has been dealing with multiple postponements and constellations due to COVID-19, we are happy to commit our payment will be made



within thirty (30) days of our reaching sales of remote 8000 tickets where we earn an average fee of \$3.00, and the events occur at the Venue. If there is a delay in hitting the minimum here, we will gladly provide the signing bonus as soon as the threshold is reached.

2.4.2. **Annual Marketing & Sponsorship spend, including ticket inventory purchase?**

Beginning in year two (2), Etix will provide annual marketing and sponsorship spend of five thousand dollars (**\$5,000**) each year. As our industry has been dealing with multiple postponements and constellations due to COVID-19, we are happy to commit our payment will be made within thirty (30) days of our reaching sales in year two and three, respectively, of 8000 remote tickets where we earn an average fee of \$3.00, and the events occur at the Venue. In the event there is a delay in hitting the minimum here, we will gladly provide the annual marketing commitment as soon as the threshold is reached.

This represents a total investment as follows:

**Signing Bonus = \$5,000**

**Annual Marketing Spend Yrs 2 and 3 = \$10,000**

**Total Etix dollars to Cain Center for the Arts over term = \$15,000**

- 2.4.3. **Other incentives?** Etix is a staunch believer in providing its partners with every opportunity to learn as much about all the tools and services we offer. To demonstrate that commitment, Etix will provide lodging and meals for one (1) Cain Center for the Arts employee to attend an Etix continuing education event-either Etix Live or Etix Blast during each year of our partnership.



2.5. **Settlement: Describe in detail your policy regarding the settlement.**

- 2.5.1. **How often will you be remitting payments and ticket sales proceeds?** We provide options for the Cain Center for the Arts. If you choose to use our merchant processor services, whereby the funds flow to us, we are happy to discuss options of remitting the funds to the Can Performing Arts Center regularly (weekly or post-performance). Some client partners request these funds be sent weekly; others prefer receiving proceeds once the events occur. We are happy to work with you here to establish a settlement plan that works for you. If you use your merchant processor, you will receive the gross funds daily and we will invoice you once per month for our fees.

- 2.5.2. **Explain in detail your monetary control functions which may include but are not limited to event settlements and funds distribution, deposit procedures, maintenance of an escrow account established specifically for Cain Center for the Arts event ticket sale proceeds, and various other guarantees you will provide that assures that Cain Center for the Arts will have absolute, total, and timely control over all event proceeds until the event has taken place.** Etix is a privately held company based in Raleigh, NC. We are extremely well-capitalized and are happy to privately discuss details to ensure your satisfaction that we are completely capable and secure in protecting all the funds that come through our solution. Further, we offer the option for the Cain Center for the Arts to control the money! The Etix solution provides completely integrated payment processing with all ticket sales. All standard methods of payment are accepted. In addition, a major plus of our offering is that the Cain Center for the Arts can choose to use your merchant processor and have all sales from all sales points, including online, remote outlets, mobile, and all Telephone Sales Center sales deposit directly into your

merchant account for credit cards. This translates to the Cain Center for the Arts enjoying your preferred credit card rate with your bank; you receive the funds daily into your bank account; you receive the full amount of the transactions including surcharge revenue, if applicable; and Etix invoices you for our fees once per month. For example, if a \$20 ticket + fees equaled a total transaction cost of \$23, for any transaction where a credit card was used (online, telephone, mobile, box office) Cain Center for the Arts would receive the \$23; Etix would submit an invoice for its share of the \$3 at the end of the month.

**Section 3. References:** Please do not have references contact Cain Center for the Arts on your company's behalf. Please do not submit letters of reference with your response. Note that your references may not be contacted during the initial evaluation period.

**3.1. Provide a list with current website links for all clients you service of similar size and scope to the Cain Center for the Arts.** Please find listed below a representative example of some of our valued client partner websites. As we support hundreds of similar clients nationwide, we hope this representative list will satisfy your request. If you would like additional information, we are happy to address your request.  
<https://vpa.uncg.edu/>    <http://ekucenter.com/>    <https://lowellauditorium.com/>  
<https://spectaclelive.com/tickets-events>    <https://fmupac.org/>    <https://www.reddingcivic.com/>  
<http://www.capitoltheatrewheeling.com/>    <https://www.limaciviccenter.com/>

**3.2. Provide three (3) references located in the United States for Cain Center for the Arts to call to discuss your service offerings, including the following:**

- **Facility Name:** Capitol Theatre / Wesbanco Arena
- **Contact Name:** Denny Magruder
- **Title:** Executive Director
- **Email Address:** dmagruder@wesbancoarena.com
- **Phone Number:** 304-233-7000
- **Website:** <https://www.capitoltheatrewheeling.com/>
- **Products Used:** Full-service ticketing, scanning, and marketing services for the Capitol Theatre, which provides Broadway, Symphony, and other concert events throughout the year, and 7600 seat arena hosting Wheeling Nailers ECHL hockey team, Feld, Disney, and Monster Truck events, concerts, rodeos, state high school tournaments, and more.
- **Number of years in service on the current platform:** 8.5
- **Facility Name:** Eastern Kentucky University Center for the Arts
- **Contact Name:** Ryan Poynter
- **Title:** Director of Business Operations
- **Email Address:** ryan.poynter@eku.edu
- **Phone Number:** 859-622-7469
- **Website:** <http://ekucenter.com/>
- **Products Used:** Full-service ticketing, scanning, parking, membership, and student access services for the performing arts center.
- **Number of years in service on the current platform:** 8+
- **Facility Name:** Bismarck Events Center/Belle Mehus Auditorium
- **Contact Name:** Charlie Jeske
- **Title:** Executive Director
- **Email Address:** jeske@bismarcknd.gov
- **Phone Number:** 701-355-1372

- **Website:** <https://www.bismarckeventcenter.com/>
  - **Products Used:** Full-service ticketing, scanning, and marketing services for the Belle Mehus Auditorium, which provides Broadway, Symphony, and other concert events throughout the year, and 10,100 seat arena hosting North Dakota Rodeo, concerts, Feld events, state high school tournaments, and more.
  - **Number of years in service on the current platform:** 6+
- 3.3. **Provide a list of client accounts lost through early termination or nonrenewal over the past three (3) years. Include contact name and phone number, length of service at each account, and reason for loss.** As a privately held company, Etix does not publish this information publicly in proposals. While every company sees some client attrition, we are very proud of our track record and can share that the number of clients who leave Etix are extremely few. Further, we also are happy to share that of those who have left our services over time, several have come back to us, and we have migrated hundreds of clients to Etix from legacy platforms.
- 3.4. **Scope of Services: Respond to each item under the Requirements & Questions section of this RFP.**
- 3.5. **Demonstrate an understanding of the services required under this contract.** Etix is well-versed in the services required, completely understands, and is capable to exceed the requirements set forth here now and in the future.
- 3.6. **Include a breakdown of tasks necessary to successfully accomplish Cain Center for the Arts goals.** Etix provides a structured onboarding process that will identify each partners' roles and responsibilities both during launch as well as ongoing throughout the partnership. This covers all aspects of the system, training, marketing, finance, and business. We use this same process for all clients; it works extremely well. We are happy to share this with you in our demonstration.
- 3.7. **Show number of days required to make delivery after contract signed. Delivery time may become a basis for making an award. Delivery shall be within the normal working hours of the Cain Center for the Arts, Monday through Friday, unless otherwise specified.** From the time the agreement is signed, we typically expect to have all tasks completed and your selling tickets within 4 weeks. We can expedite that, as well, if necessary.

## Evaluation Criteria

During the evaluation process, an analysis will be performed to assess the response given for each requirement. In situations where the vendor's base product does not completely meet the requirement, it is critical that the vendor provide alternate methods and customization estimates where appropriate. Furthermore, methods that require a partnership between the vendor and a third party should be described. If the requirement will be satisfied in a future software release, the vendor should provide the target release date.

The Cain Center for the Arts retains the right to reject or accept any proposals.

The submitted proposal responses will be evaluated on the following criteria:

- Company Experience, overall business and financial viability
  - Years in business developing this specific product
  - Previous experience particularly at another organization of similar size and scope
- Vendor's ability to demonstrate the suitability of product functionality based on the requirements of the Cain Center for the Arts
- Quality, reliability, and overall functionality of the vendor's product
- Overall pricing and cost-effectiveness of the solution
- Vendor's ability to provide the Cain Center for the Arts with control and messaging of consumer touchpoints
- Vendor's ability to meet the implementation date required, and facilitate a smooth implementation of their system

- Vendor's ability to provide the necessary support for implementation, ongoing maintenance, and upgrades
- Vendor's experience in providing integrated ticketing, marketing, development, and venue management solutions

## Contract Negotiations

**The preparation and submission of vendor response shall be made without obligation by the Cain Center for the Arts to pay any development costs, to acquire any items included in the response, or to discuss the reason why the vendor is/is not recommended.** Etix agrees and complies.

**The vendor will be required to agree to the inclusion of warranties in offers of commitments made in the response or in subsequent information supplied. Cain Center for the Arts expects that each statement of fact and of future performance will be incorporated within the contract as a warranty. Therefore, any statement of fact or of future performance not intended to be a warranty should be clearly identified. The vendor's response to the RFP will be included as an addendum to the final contract.** Etix agrees and complies.

**Under this RFP, Respondent's pricing shall remain firm for a period of no less than one hundred and twenty (120) days following the submission date, in order to allow time for evaluation, approval, and award of the contract. Any Respondent who does not agree to this condition shall specifically communicate in its proposal such disagreement to the Cain Center, along with any proposed alternatives. The Cain Center may accept or reject such proposed alternatives without further notification or explanation.** Etix agrees and complies.

**The contract term should have 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.** Our offer is based on a (3) year term.

## Confidentiality

**Information disclosed to vendors and vendor employees by the Cain Center for the Arts will be considered confidential and proprietary when it pertains to past, present, and future ticketing activities and/or is not readily available to the public.** Etix respects the confidentiality and requests the same of the Cain Center for the Arts for our information provided through this proposal.

# Requirements & Questions

Supplier should include in their response if they do or do not support the requirement (Yes or No).

## 1. CRM

Required Feature	Response (Yes, No)
1.1 Ability to manage customer relationships and households	Yes
1.2 Ability to easily review customer purchase history	Yes
1.3 Search for and prevent duplicate records and easily merge	Yes
1.4 Record and report on a variety of customer data points	Yes
1.5 Easily search for and choose existing customers during the administrative sale process	Yes

## 2. Sales

Required Feature	Response (Yes, No)
2.1 Ability to sell events, memberships, series/seasons, sponsorships, donations, merchandise, and gift vouchers in a single order	Yes
2.2 Ability to create add-on and up-sell options that are triggered by specific criteria and sales flow. I.e. add on parking, upsell membership	Yes
2.3 Allow for use of standard payment methods	Yes
2.4 Allow for use of alternative payment methods, i.e. Apple Pay, Tap to Pay, Venmo, PayPal, CashApp.	Yes
2.5 Ability to process multiple payment methods on a single order	Yes
2.6 Ability to apply down payments and report on outstanding balances	Yes
2.7 Ability to reserve seats to be paid for later	Yes
2.8 Ability to automatically generate invoices for reservations made that adjust accordingly as deposits, payments taken, and order edits are made to a reservation	No
2.9 Ability to process a quick check-out with no registration or account/customer information	Yes
2.10 Ability to easily sell memberships	Yes
2.11 Ability to easily sell flexible packages and redeem in a single transaction	Yes
2.12 Ability to issue complimentary tickets	Yes
2.13 Ability to easily exchange tickets through the back office	Yes
2.14 Ability for customers to easily exchange tickets through their online account	Yes

## Sales Questions:

- **Are any per ticket fees set by the supplier, or are all fees fully controlled and set by the Cain Center?** The only fees we will set are the Etix per ticket fees for remote sales and the credit card fee if you elect to use our merchant processor. You have complete flexibility to add any fees at all points of sale.

### 3. Memberships & Packages

Required Feature	Response (Yes, No)
3.1 Ability to give early access to members, subscribers, special groups, or fan clubs	Yes
3.2 Ability to give access to special seat inventory to members, subscribers, special groups, or fan clubs	Yes
3.3 Ability to automatically renew membership and subscriptions	Yes
3.4 Allow customers to complete/pay for renewals through an online consumer portal	Yes
3.5 Ability to automate discounts, offers, and benefits for patrons based on criteria. Ex. Members / Subscribers get 20% off tickets.	Yes
3.6 Ability to create and use promotion codes for access to discounts and priority booking	Yes

### 4. Donations

Required Feature	Response (Yes, No)
4.1 Ability to collect donations, including automatically recurring donations	Yes/No
4.2 Ability to issue branded, customizable, itemized receipts suitable for tax reporting	Yes
4.3 Ability to create and track pledges	No
4.4 Ability to tag customers with a track and readiness	Yes
4.5 Ability to record conversations and interactions	Yes
4.6 Ability to schedule and manage future interaction or asks	Yes
4.7 A moves management dashboard where we can track the life-cycle of major and corporate gifts, sponsorships, etc.?	No
4.8 Ability to assign and delegate "tasks" across various users. Ex. Follow-up with a donor on XX date?	Yes
4.9 Ability to integrate with a fundraising and development software for seamless communication, i.e. Neon CRM	Yes

### 5. Event & Venue Management

Required Feature	Response (Yes, No)
5.1 Ability for event creation/set up be done by the Supplier, if needed, at no additional cost	Yes
5.2 Ability for event creation/set up to be done by ticket office staff, if desired	Yes
5.3 Ability for events be set up in as little as one (1) day in advance of ticket sales	Yes
5.4 Ability to create reserved, general admission, and combined reserved/GA seat maps with multiple configurations, at no additional cost	Yes

5.5	Ability to control ticket prices including the ability to create facility fees, and per ticket fees based on point of purchase and sales tax	Yes
5.6	Ability to easily adjust event details (seating, price structures, etc.) at any time, even when the event is already on sale	Yes
5.7	Ability to put seats on hold	Yes
5.8	Ability to remove/kill seats from a chart on an event-by-event basis	Yes
5.9	Discount code management providing customer max and promo code max/cap options	Yes
5.10	Has proven capabilities to handle volunteer and staffing management	Yes
5.11	Ability to integrate with a venue management system, i.e. Prism	Yes

### Event & Venue Management Questions:

- **Describe any event staff and/or volunteer scheduling functionality, if included or optional.** Etix does not provide staff or volunteer scheduling tools. We welcome your suggestions here and are happy to learn about your goals.

## 6. Marketing

	Required Feature	Response (Yes, No)
6.1	Ability to fully brand and customize online product sales channel	Yes
6.2	Ability to track web activity, including click-through and fall-off rates with Google Tag Manager and cross-reference with ticket sales	Yes
6.3	Emails that are mobile optimized	Yes
6.4	Ability to create custom-branded pre & post-event emails	Yes
6.5	Ability to mine existing customer data using "and" "or" and "exclude" operators to identify new marketing opportunities	Yes

### Marketing Questions:

- **Describe any CRM-type marketing automation capabilities that are part of the standard product, including email, pre-and post-event follow-up, surveys, donor management, etc.**

The Cain Center for the Arts marketing team will receive full access to our in-house, digital marketing team, Rockhouse. Rockhouse acts as an extension of your marketing team, aiding in data analysis, email marketing, website consultation, digital advertising campaigns, and general consulting/best practices. Whether you need assistance with accessing your ticket buyer data and placing tracking pixels or want Rockhouse to create and execute large-scale digital advertising campaigns (including ads through Facebook, Instagram, Twitter, Google Display Network, PPC, YouTube) on your behalf, Rockhouse has you covered.

The Rockhouse team will work alongside the Cain Center for the Arts marketing team to analyze current marketing efforts, with a large focus on ticket sales revenue. Rockhouse will also assemble and execute digital marketing plans to increase ticket sales revenue, which will be tracked through tracking links and conversion pixels in the Etix system.

Our hands-on marketing team has years of experience in the ticketing space and is committed to driving increased sales through your brand using both digital and traditional marketing resources. Our marketing team + your marketing team = a ready source of revenue ideas. We believe in this to such an extent that we build our entire partnership paradigm on the premise that we only win when you win.

**Email Marketing**

Email marketing is typically the #1 driver of ticket sales for our clients. To ensure that your emails are not hitting spam filters and are encouraging conversions, we have teamed up with Hive as our preferred email partner. When building a show on the Etix platform, you can use a category and subcategory to classify the event. Etix will regularly extract your ticket buyer data from the system and then import it into Hive. Upon doing this, we use the aforementioned categories and subcategories to group ticket buyers so you can send to as many of these groups as you'd like when creating an email blast. If you'd like to create custom segments based on several parameters (including but not limited to: events attended, lifetime spent with your venue, date of transaction, price code, etc.), you can use our in-platform CRM tool Etix Community. Upon generating segments in Etix Community, you can export them directly into your MailChimp account.

In addition to configuring your Hive account, we will build mobile-friendly, conversion-focused email templates for your team to access. Etix can build email drafts on your behalf and send them to the appropriate contacts after obtaining your approval. There is no limit to the number of emails that you can send through Hive, so your team will have access to the account to send emails when needed. Hive integrates seamlessly with Google Analytics so you can see ticket revenue resulting directly from your email campaigns.

**Digital Advertising**

Providing strategies for clients that convert over \$1M in ticket sales annually, our Etix digital marketing experts specialize in crafting digital plans that capitalize on your events' sales cycles. Digital plans include PPC, display & retargeting campaigns through Google Ads and AdRoll, paid social media ads through Facebook, Twitter, and Instagram, as well as streaming ads through YouTube and Spotify.

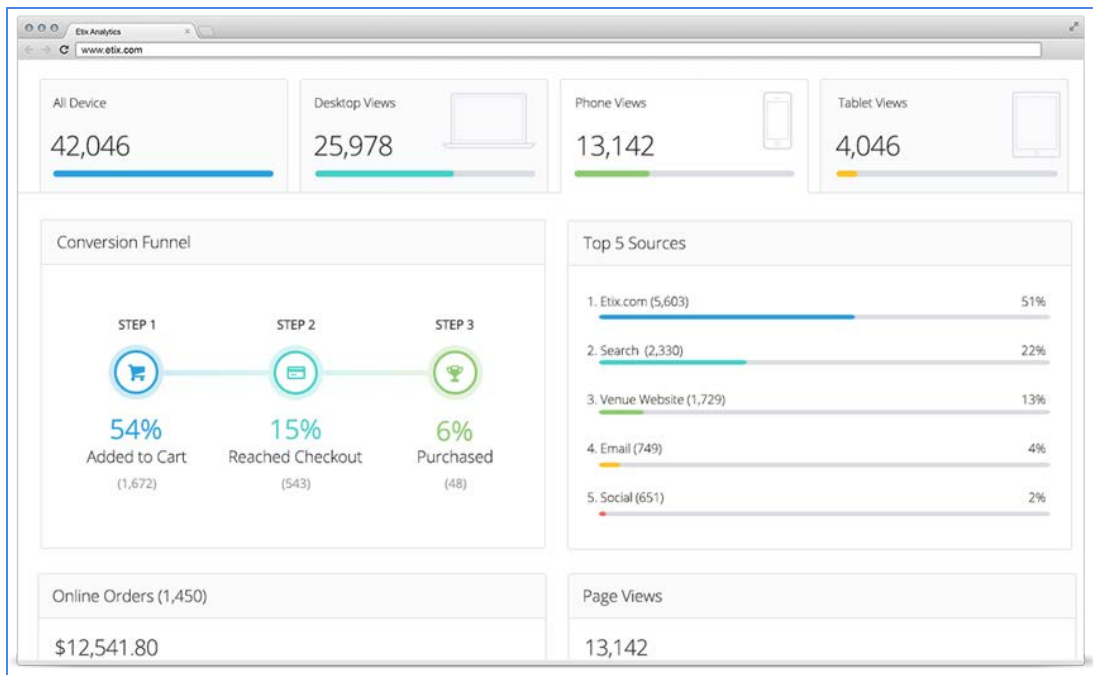
Rockhouse leverages remarketing audiences through retargeting pixels and custom audience creation to ensure high conversion rates. Conversions are tracked through pixel placement on Etix confirmation pages which pass back revenue, Order ID, and currency.

**Contesting**

Capturing prospective patron data is an integral component of a successful digital strategy. Rockhouse makes this easy by providing resources to launch contests through different platforms including Wufoo, Gleam, and EZ Texting. Depending on the goal of your contest, our Etix digital marketing experts will create the appropriate strategy to encourage the most potential signups. Once your contest has concluded, our Etix digital marketing experts will help you leverage the entrants' data for follow-up email campaigns and retargeting audiences for digital ads.

**Etix Analytics** is our in-platform analytics tool that provides your team with charts, graphs, and tables to describe data and trends that have been assembled using your ticket buyer data. On the next page are a few examples of tools available to you at absolutely no cost:

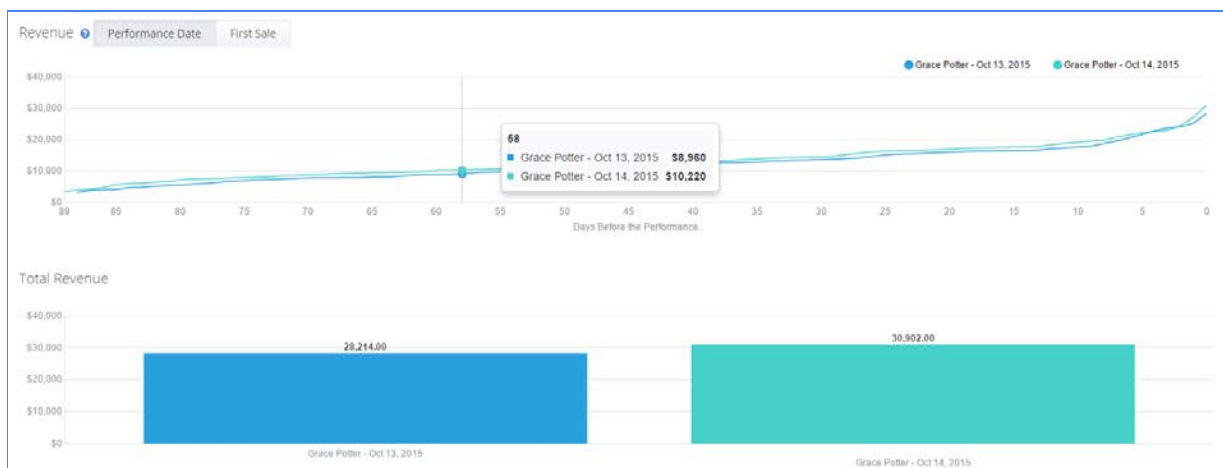




### Analytical Reporting and Consulting

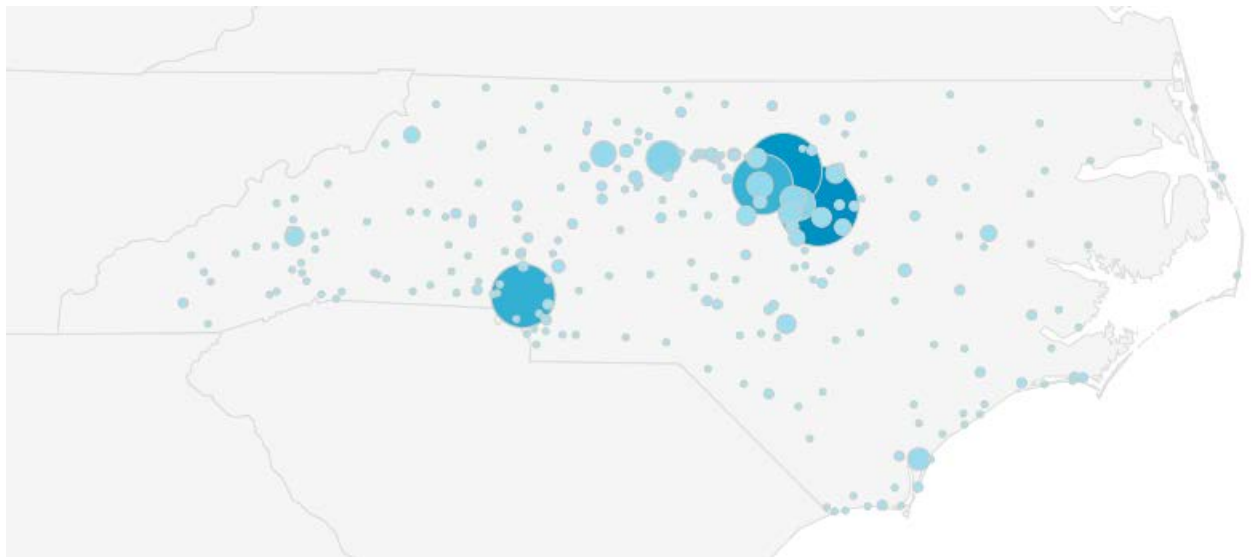
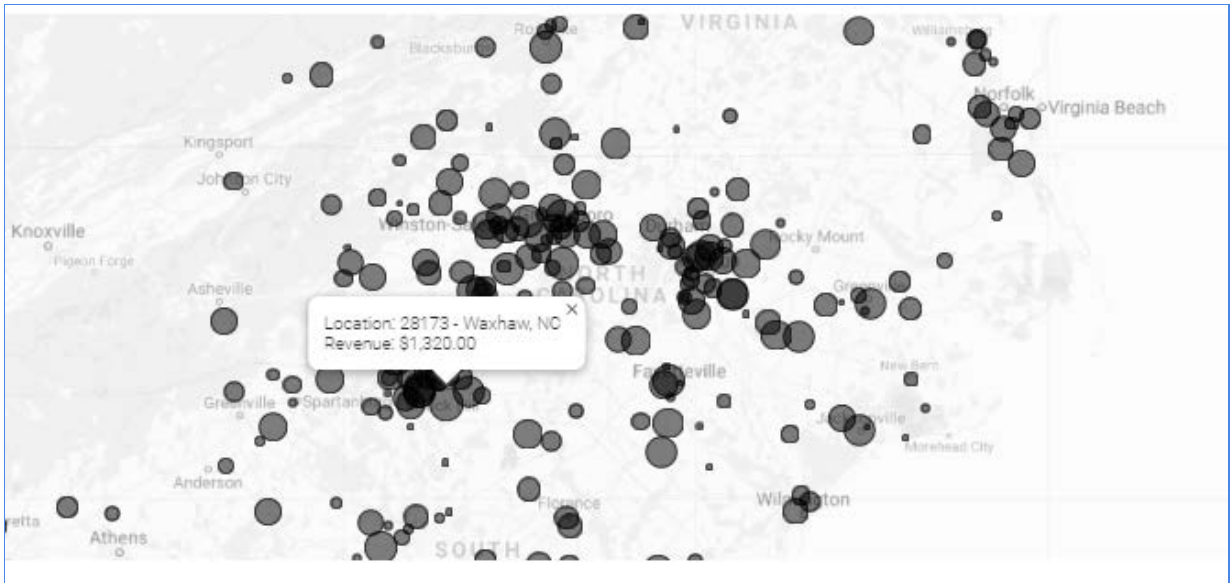
Data empowers marketing teams to make decisions, understand their audiences, and react to changes. We have created an all-encompassing dashboard solution that syncs data from different marketing platforms into one place for streamlined reporting. These data sources include Google Analytics, Google Ads, Facebook, MailChimp, and Etitx. You will have a dedicated Rockhouse Marketing Specialist who will schedule regular calls with your marketing team to discuss your data's trends as well as troubleshoot any marketing issues you may have.

Rockhouse will also help configure **Cross Domain Tracking** in your Google Analytics account and on your website to effectively track a customer's journey from a source to your website, through their purchase on etix.com. Etitx provides our wholly-owned; powerful Etitx Analytics suite of reports that give you up to the minute- deep data about your buyers, searches, event comparisons, and so much more. Below are just a few examples of reports and automated email marketing tools available to you at absolutely no cost:



**Event Comparison Report:** This report allows for multiple events (past, present, and future) to be selected so you can see how sales are trending in comparison to each other over time. You can see how ticket sales are tracking

from the first day of sale or switch the chart to show you how ticket sales are tracking out from the day of the event. This tool is great to see how sales for similar artists are pacing as well as understanding peak times that your consumers purchase.

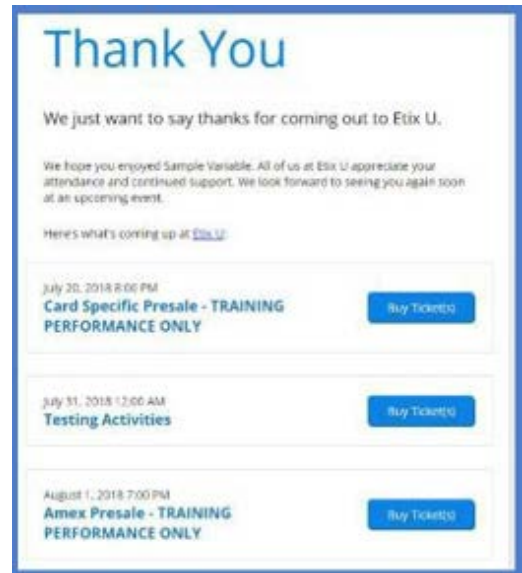


**Sales by Geo:** This tool populates a map with points showing where revenue for a particular event is coming from. More accurate than Google Analytics, this location data is collected when a patron enters their zip code during the purchase process. This tool is commonly used by our Rockhouse team when determining geographic regions to target with digital advertisements. Many clients also use this tool to understand different regions where revenue is coming from so they can plan traditional marketing activities including radio, TV, or print.

**Presale Email / Phone Capture:** When an event is announced but not on sale, the Etix ticketing page will have the event info, a countdown clock to the on-sale, and a box for buyers to input their email address or phone number to receive an email or text message one hour before the event on sale with the ticketing link. Those who have not purchased tickets will receive another email or text message 24 hours before the event if tickets are still available.

**Cart Abandonment & Retargeting:** Automatically send customers an email when they haven't completed a transaction that links directly to the performance page. The average conversion on the cart abandonment emails are over 21%.

**The post-event Thank You** automated email is sent to ticket purchasers 12 hours after being scanned at the event. If the ticket is not redeemed, the patron will not receive a post-event Thank You email. There is a space at the bottom of these emails to include other upcoming events either in chronological order or of a similar genre - these are customizable. There are various other customizable features within this email as well such as the header, venue message, etc.



**The Rockhouse Dashboard** is a one-stop-shop for all of your relevant marketing metrics. Fully visualize and interact with your data from several third-party applications, including Google Analytics, Google Ads, and Facebook Ads. At a glance, you can see revenue and session metrics, as well as ads campaign performance. Below are two examples:



- **Describe social network (Facebook, Twitter, etc.) tie-ins, interfaces.** Etix integrates with Facebook with our ‘publish to facebook’ tool. As soon as you build performances in the system, you are given the option to push the event to Facebook - it will automatically create a Facebook event. We are also integrated with platforms like Songkick, Bandsintown, etc. which scrape our show data and populate our upcoming events on their platforms.
- **Can the system integrate with WordPress? If yes, describe integration capabilities and processes. If not, describe other methods of website integration.** Yes, the Etix system can integrate with WordPress. Our client sites are built on WordPress as well. We have the Etix API that can directly pull your performance data over to the website.
- **What SMTP environments will your solution integrate with? Special SMTP requirements?** We support SMTP for email marketing through Hive.

- **Does the system integrate with any email marketing solutions (Benchmark, Constant Contact, Mailchimp, etc.)? If so, describe specifics.** Yes. Etix is fully integrated with an email platform called Hive. This integration allows your event data, ticket buyer data, and revenue to pull over in essentially real-time for a seamless email building/reporting process. We also have a small integration with Mailchimp; however, the Hive solution is more full-service.

## 7. Reporting

	Required Feature	Response (Yes, No)
7.1	Easily pull regularly needed reports i.e. settlement, financial, daily sales, customer information, event information, total sales & availability, reservations, outstanding balance, etc.	Yes
7.2	Easily create custom reports	Yes
7.3	Schedule reports to be run and emailed to both internal and external contacts	Yes
7.4	Export data to CSV, Excel, and PDF	Yes
7.5	Report by transaction date or event date	Yes
7.6	Report on each price point including full-price and discount or comp tickets	Yes
7.7	Ability to report on a 360 view of customer purchase and activity history	Yes

### Reporting Questions:

- **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.** Our extensive reporting suite, consisting of literally hundreds of reports covering ticket inventory, event, data analytics, user, payment, and CRM activity is used by Performing Arts venues, Arenas, Amphitheatres, Exhibit Halls, and Auditoriums throughout the United States to manage and measure their business. Different reports can be downloaded under separate rules. The Etix Manager mobile application empowers you and your authorized presenters to view consolidated reports on their mobile devices for sales and access control live statistics at will. Etix continues to provide all the traditional reports from the ticket office, daily reconciliations, and event settlements. For example, our Detailed Audit, as defined in the system, cannot be edited. Other reports can easily be copied into Excel and treated as CSV data. When you choose to print a report, you can usually choose PDF as a format. Please see several sample reports located in the Exhibits file attached to this document. There are no third-party reporting tools required.
- **Attach a list of existing stock/canned reports, with the definition and usage of each report.** Please see the attached Reports Exhibit attached to this proposal.

## 8. System

	Required Feature	Response (Yes, No)
8.1	Allows for unlimited system users per license	Yes
8.2	Ability to assign detailed, role-based user security profiles, with varying permission levels across platform interfaces	Yes
8.3	Level 1 PCI DSS compliant	Yes
8.4	Ability for supplier to be merchant, and for payment processing to be sole responsibility of supplier	Yes
8.5	Ability to sell all products on these sale channels; ticket office, internet, and mobile devices	Yes

8.6	Ability for consumers to use any device for purchases, smartphone, tablet, desktop including the ability to pick reserved seats	Yes
8.7	Easy to use intuitive interface for both back office and online sales	Yes
8.8	Allow standard ticket delivery methods(will-call, mail, print-now), as well as e-ticket, email, and mobile delivery	Yes
8.9	Support Apple/Android mobile "wallet" tickets	Yes
8.10	Allow integrated access control using wireless devices to scan and validate barcoded tickets	Yes
8.11	Ability to create custom-branded order confirmations on an event level	Yes
8.12	The look and feel of solution can be adapted to our branding design, and be branded to multiple designs for different community organizations while still pulling from one database	Yes
8.13	Supports all major modern browsers? (IE, Firefox, Safari, Chrome)	Yes
8.14	Easy to use intuitive interface for both back office and online sales	Yes
8.15	Allow standard ticket delivery methods(will-call, mail, print-now), as well as e-ticket, email, and mobile delivery	Yes
8.16	Support Apple/Android mobile "wallet" tickets	Yes
8.17	Allow integrated access control using wireless devices to scan and validate barcoded tickets	Yes
8.18	Open API for advanced integrations	Yes

### System Questions:

- **If supplier can act as Merchant (8.4 = Yes):**
  - **Describe how revenue is settled** - Either weekly in advance or post-performance, depending on your preference.
  - **How does the merchant name appear on the customer's bank statement after purchase?** Ultimately it is up to the cardholder's bank if they pass a descriptor along. We recommend something recognizable at the Organization level. For example, for the Wagner Noel Center, which is part of the University of Texas Permian Basin, we would recommend Wagner Noel PAC; not UTPB or the college name spelled out.
- **Describe the product's mobile responsive design.** Etix is html5 coded and will work with any mobile device. All patron-facing pages, including the Etix.com e-commerce purchase flow, are fully responsive. We regularly test our ticket buying experience against all browsers and devices to ensure a clean, efficient checkout process for all patrons, regardless of browser or device
- **Describe online web page creation process, indicating whether pages visible before "Buy Ticket" are created in your software or by our own web developers.** You will have control of your pages before the buy ticket button as well as extensive flexibility to add images, define cobrands, and more on the Buy tickets pages on Etix.
- **Describe approach to accessibility compliance.** Etix proudly is ADA compliant at all points of purchase. Our approach is to be active with industry standards to stay compliant and learn any new modifications through national ticketing associations, local, regional, and national authorities, and more.
- **Describe any form building functionality, if included or optional.** Etix provides extensive flexible options for our clients. Some require interaction with your client service experts; some are completely customizable on your own. A few of the most common options for flexibility include custom tickets, receipts, invoices, and membership layouts.

## 9. Service and Support Questions

- **Where is the primary location of the service organization directly responsible for maintaining the Ticketing System and the service area covered?** 909 Aviation Parkway, Suite 900, Morrisville, NC 27560
- **What is the guaranteed response time for service?** The typical response is 15 minutes. We are happy to discuss your request for a guaranteed response time to meet your expectations. Usually, venues ask for our guarantee to be within 24 hours. We are happy to say that today and welcome your feedback. **Is there a charge for expedited service?** No.
- **How frequently are revisions and updates to software released?** Updates and new features are regularly released to the user community with no disruption or requirement by our client community to do anything at the client end. Releases occur several times weekly. In 2021, we introduced more than 900 updates and new features.
  - **Is there a pre-set schedule?** Etix releases new features as soon as they are available to our client community. Releases are typically brought to production between 2 AM and 5 AM eastern time.
  - **Is the system upgraded automatically?** Yes. There is nothing required on your end.
  - **Please describe any QA and roll-back procedures.** Etix tests both internally and with select clients' beta releases and always maintains the ability to roll back any release instantly. Our Product and IT teams monitor all releases in beta with extensive testing at all levels as well as when they come to production. We also leverage rolling releases to production so we can monitor the impact and remove a server or pause the release if there are any unforeseen bugs or unforeseen circumstances (s).
  - **Please share any costs associated with upgrades.** There are no costs to the Cain Center for the Arts for upgrades.
- **Are system upgrades, patches, tweaks, improvements and feature developments available to all clients regardless of version? If not, please describe restrictions, costs, and requirements of regular upgrades.** Yes, all are available to you as an Etix client partner and there are no costs associated with any of these.
- **Is there a customer forum for feedback?** Absolutely. Etix is a client-driven solution and our upgrades, enhancements, et al. are a direct result of input from our client community.
- **Has the system, or system infrastructure you use, had an outage in the past 24 months? This can be defined as any period in which the system was unexpectedly unavailable for use by any of your clients. If so, please describe the outage, the time-frame to correct, and correction steps.** No. We gladly share that we have not experienced any outages that caused the system to be unavailable in the past 24 months.
- **How does a client submit/get approved product enhancements to be incorporated into the base product?** We invite and encourage our clients to share any requests that will help them and the patrons. Internally, we use a tool called Jira to accept enhancement requests in an organized way which then allows our Product team to learn and understand the goals and benefits. The requests then flow through Jira from idea to reality over time - those that are most popular tend to rise to production faster. Simply communicate through your Etix client service expert and they will submit the request(s) for you.
- **Describe the avenues clients can participate in to influence the development of your products.** We love input from our clients as this is what drives the development of our solution(s). Etix Live, Etix Blast, direct communication with your client service partner, meeting at INTIX, IEBA, LHAT, IAVM, APAP, and other conferences.
- **Can the Cain Center maintain an adequate test/training environment?** Yes. We provide test venues on the same live system that is available to you at any time.
  - **How will the test environment be refreshed and how often is the refresh of data?** Our training team maintains the test environment on the live Etix platform and new enhancements are automatically added here. Your test data is fresh every time you log in.
- **Describe your training programs and their costs (at time of purchase and after for retraining and/or follow-up).** Etix proudly provides complete training from launch throughout the life of our partnership at no training cost to you; ever. We have complete live training, webinars, recorded video sessions, Etix Live in-person learning labs, and Etix Blast. We also provide several system tools in the system such as notifications of new features, Knowledge Base, and much more. Your Etix client partner is also dedicated to helping at any time.

- **What training is included in your proposal?** Etix provides complete remote training from the start of our partnership and ongoing any time at no cost to you; ever. All training, webinars, Etix Live and Etix Blast are provided for you at no training cost.
- **Describe your support agreements. Please include all support options for the Cain Center to consider in your proposal.** Etix provides a turnkey system, clients services, digital marketing, and technical support for our solution(s) and equipment that we provide as part of our partnership. We do not charge for support; ever. This means that you never have to worry about support levels, etc. With Etix, we cover you from start to finish.
- **Describe supplier's future development plans roadmap regarding new feature releases, new technology implementation, and projected life cycle of the current product.** We are delighted to share that our client community has a voracious appetite for new features. To this end, we are always developing enhancements and have literally hundreds of new features in the queue, being tested, and coming live to production all the time. The Etix solution continues to evolve to stay vibrant and exceed expectations. We are happy to share with you our current roadmap privately.
  - **Describe in summary each newly planned feature for the next 12 months.** We respectfully do not publish our new feature plans in public documents. We are happy to discuss and share this with you privately and are certain you will be completely satisfied. Our company employs more than 30 full-time developers and IT staff who work exclusively for Etix.

## 10. Security and Infrastructure Questions

- **Describe what IT you support and any support requirements for the Cain Center IT personnel.** Etix provides complete support every day, 7 days per week, for all technology we provide to Etix client partners. Our network specialist, Ray Weston is happy to work with your IT expert(s) to consult on your Internet access and access point configurations at the Cain Center for the Arts to enjoy the best results on our system. We only ask your IT folks to provide dedicated Internet access (wired or password controlled wireless) for scanning, selling tickets, and reporting onsite.
  - **Are there special network requirements?** No. All we need is ~25mb dedicated up/down.
  - **What firewall or DNS requests are expected?** We do not need to get behind your firewalls. All we need is access to the Internet and support Microsoft Edge, Chrome, and Firefox browsers.
  - **Are there specific OS or Hardware requirements?** If so, please list base system requirements. We will provide the Etix equipment in a ready-to-go state so you do not need to do anything. All we ask of the Cain Center for the Arts is clean Internet access (wired and/or password controlled wireless) and power. Etix is a Windows-based application.
  - **What other security measures are required or recommended for your solution?** We provide all the proper system-related security measures at our end for the system. Some clients choose to leverage a V-Lan for our ticketing onsite to maintain separation.
- **Describe your network and data security.** The Etix system is an Internet-based solution that operates in a hosted environment using AWS cloud servers. The database runs an incremental backup daily and a full backup weekly. Logs are backed up to AWS and a PCI compliant 3rd party security vendor in near-real-time (< 5-minute delay). The Etix application and your data are only accessible by your authorized users, who are assigned unique credentials to access your information on the system. Nothing is stored locally on-site unless you download data into your network. This translates to your ability to easily flex to several alternatives if this happens.
- **Describe your data storage.** Etix uses an Oracle 11 G Enterprise level Database which is housed on AWS servers.
- **Describe your disaster recovery procedures and how often you test them.** As you might expect, for security purposes, we refrain from publicizing our full disaster recovery plan in public proposals. Rest assured, however, that we have a very detailed plan that we are happy to show you in person. Further, as we utilize AWS servers, we are happy to share there are multiple data sites and disaster recovery locations to protect our clients and the data up to the minute. In the past several years combined, our unplanned downtime can be measured in seconds; not even minutes.

### Yearly Application Penetration Tests



Each year we hire a company to attempt to hack our system from both the frontend / online side and the box office side. If any exploitable vulnerability is found it will be fixed immediately.

**Bi-annual Network Penetration Tests**

Every 6 months we perform network penetration tests to confirm that there are not any open ports or services running on the network that are not required for the business to operate.

- **Describe your policies, procedure, notifications, and obligations in the case of a security breach at your facility.**  
We are proud to share that our system has never encountered a breach. That said, we do have security procedures to secure and address any such occurrence as well as tools to instantly notify any and all concerned via email and via other secure means. Again, to solidify our methods to mitigate these, these bear repeating:

**Yearly Application Penetration Tests**

Each year we hire a company to attempt to hack our system from both the frontend / online side and the box office side. If any exploitable vulnerability is found it will be fixed immediately.

**Bi-annual Network Penetration Tests**

Every 6 months we perform network penetration tests to confirm that there are not any open ports or services running on the network that are not required for the business to operate.

- **Has there been a data-breach incident of your software in the past 7 years? If so, please describe dates, number of clients impacted, and steps taken to correct system vulnerabilities.** We are proud to share that our system has never encountered a breach.
- **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.** We are happy to protect the Cain Center for the Arts for any security breach that is a direct result of our system/solution caused by us except for those that are outside of our control. For example, a breach of a credit card company on a merchant processor is outside the scope of our control. We welcome your input here and are certain we can create language to satisfy concerns.
- **Describe the handling of our information at the End of Agreement, or termination of the contract. Some issue that should be addressed are:**
  - **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.** We welcome your thoughts to learn more here from you as to your goals. We do not put our solutions in escrow. As a 22+ year privately held company, we are absolutely certain that we are completely capable of honoring our commitments for the life of our partnership.
  - **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.** In the highly unlikely event we ever end our relationship, we always guarantee your access to your data will be 100% available to you until such time as you are satisfied that you have everything you need. We will then remove all data from our system and are happy to confirm this to you at any time. We believe that the last touch with a client partner is every bit as important as the first; the few who have left our partnership and then returned validate that to us.