

Connecticut Science Center

Ticketing & CRM System RFP

March, 2017

INTRODUCTION

The Connecticut Science Center is seeking qualified proposers to provide a comprehensive Ticketing, Museum, and Client Relationship Management System. It is anticipated that this RFP will result in a contract award to one responsible, responsive proposer whose product best meets the current and future needs of the Connecticut Science Center and all its customers.

BACKGROUND INFORMATION

Located in downtown Hartford, the Connecticut Science Center is a thriving destination serving approximately 300,000 visitors annually, with both on-site and off-site programming for a diverse audience of families, adults, schools and youth groups.

Hosting over 165 hands-on exhibits, a state-of-the-art 3D digital theater, 4 educational labs, and a Butterfly Encounter experience, the Connecticut Science Center offers endless exploration. We provide exciting tools to help educators and parents bring textbooks and science to life.

We strive to create an engaging and sustainable science center that serves families, schools, youth groups and adult learners with significant impact on science content learning in Connecticut. We are dedicated to inspiring lifelong learning through interactive and innovative experiences that explore our changing world through science.

PROJECT NEEDS & RFP QUESTIONS

ALL 21 Questions (in Blue) Must be Answered Fully

Ticketing, Group, Online & Membership Sales

The Connecticut Science Center (CSC) will be replacing its current Ticketing and Museum Management Software System. This System is central to the work processes of every department within the organization. The Science Center requires a robust system to serve 300,000 visitors annually, including 80,000 school, youth and adult groups and roughly 6,000 member households. We will require a system that is capable of a wide variety of ticketing and reservation transactions, both on-site and online. The new system will be used as the centralized data source for the administrative and ticketing needs of the science center. The functionality must provide efficient processing, reporting and data collection to transactions including, not limited to, general admission and theater tickets, membership and renewal sales, special event tickets and educational program reservations.

The new software must possess the ability to sell tickets from multiple sites with shared real-time capacity management for online sales, ticketing counter and administrative sales. We require the capability to sell day-of and advanced tickets. In addition, we are looking for ticket scanning functionality for accurate attendance counts.

Furthermore, CSC will require the new Ticketing and CRM system to facilitate an extremely strong and compelling online sales presence that replaces the need to turn to 3rd party online discount clearinghouses such as Groupon or Living Social. The goal of CSC is to drive potential visitors to its own website to seek compelling offerings and special discounts resulting in a Call to Action by the consumer to purchase and visit.

Finally, the Group Sales effort is central to the annual revenue model of the science center and requires prospect communications, sales information, tracking the number of visitors served, and usage of grants, contracts and retail sales by client.

1. Please identify how your system can, at a minimum, satisfy the required **Ticketing, Group, Membership and Online Sales** needs & functions identified in the sections below. If your system can not satisfy any of these stated needs, how do you propose to address those gaps? Please also share how you believe your system goes beyond the stated requirements and is truly best in class in ticketing, membership and online sales.

Ticketing & Group Sales Needs

- Ability to sell individual, group, and member tickets
- Ability to sell combo tickets (general admission, movies, additional shows), managing capacities for each specific area
- Usage of coupons and promotions – on-site and online
- Scan-ready barcoded tickets – using hand-held devices
- Advance ticket sales
- E-receipts, with the capability of sending via text and email
- Ability to activate, redeem and track Gift Card usage
- Collect, track and report on key customer data such as zip code

Membership Needs

- Auto Renew functionality
- Linkage of records with ticket sales
- Track new, renewed, and lapsed memberships
- Front Desk interface with membership records to inform status of visitor
- Easy, customizable online sales membership component with printable membership cards at home. Ability to apply coupons and other discounts to membership sales online.
- Easy and quick ability to add Member photo ID to membership card at gate and at home.
- Ability to create robust client record for each Member group to be tracked by age and interest. Easily viewable at gate and back of house.

Online Sales Needs

- Mobile-ready online sales presence for general admission, membership, and donations
- Attractive & Efficient sales of tickets, movies, and events
- Membership sales and renewals online
- Upsell capability for movies, the Butterfly Encounter and additional events
- Website compatibility with mobile technologies - tablets and cell phones
- Ability to sell into an existing record by creating user names and passwords allowing secure access
- Combo sales with appropriate discounts based on what is in the basket. The ability to offer deeper discounts tied to additional purchases (the more you buy, the bigger the discount.)
- Barcoded print-at-home tickets

Client Record Management

The software needs to provide exceptional client/donor management through its CRM. It needs to provide the ability of multi-tiered relationships between records, track the number of customers served, and manage actions and remarks on individual and organizational records. The tracking of donations, pledges, and commitments is required.

Please Note: The Connecticut Science Center has not reached a final decision regarding the conversion from Blackbaud's Raisers Edge software for the management of its development needs such as membership sales, grant tracking, donations, annual giving and all manner of its philanthropic efforts.

2. We require the detailed information regarding the below two options:
 - a) In the event that the Connecticut Science Center keeps Blackbaud's Rasiers Edge product for the management of its development operations, what are the points of integration with the Ticketing Sales software and how is it accomplished. How are the existing records and transactions uploaded in the new software?
 - b) In the event that we opt for a fully integrated system, explain how records and transactions are imported, and what specific fields and information are up-loaded into the new system?
3. Please identify how your system can, at a minimum, satisfy the need for the required functions identified below. If your system can not satisfy any of these stated needs, how do you propose to address those gaps? Please also share how you believe your system goes beyond the stated requirements and is truly best in class in client record management.

Record Management Needs

- Ability to create Individual and Organizational records with relationship functionality.
- Ability to create and link individual and organizational records
- Track activity by record
- Sales and booking information by individual or organization
- Have a hierarchy for relationships (i.e. Districts, Schools and Teachers)
- Ability to communicate via individual records for Booking Notices, Invoices, Mailings
- Ability to cull database by "client type" with multiple client types per record
- Track Donations
- Track customers served
- Prospect Management

Data Migration

4. Concisely explain the requirements of data migration for all records, transactions, CRM history and donations. Can relationships be uploaded from the original software to the new system? What data will be lost and what data will be retained? Share details on how it is imported and if your organization or the Connecticut Science Center is responsible for the migration of data.
5. Please explain how duplicate records are kept to a minimum. Clearly define the requirements to clean our current data and how is it migrated into the new system. What are the associated fees for this function?

Customer Communications

We are looking to use the database for Direct Marketing segmentation with a robust integrated email source for communication. The software should enable personalized communication options to clients based on information provided by clients, as institutional metadata. We need to track client progression through our programs and communicate upcoming options specifically selected for them. The software should be capable of engaging and communicating with our unique audiences and can track the adult and children's progression through our programs, including Professional Development, camps, and teen programming.

The software needs the capability to communicate via the client record and track all actions.

6. How would the above-mentioned functions be managed with your company's product/system? How would you propose to fill any gaps for functions it cannot readily satisfy? Please also share how you believe your system goes beyond the stated requirements and is truly best in class in customer communications management.

Hardware and Mobile-Ready Devices

Software flexibility is key in order to accommodate changes, as the needs of the organization change. This includes flexibility in payment options, access control, event management and reporting.

The system must be mobile-ready for remote sales and entry of customers served on both tablets and cellular phones, with an interface that allows future transactions. The mobile-ready interface must be capable of membership sales, ticket sales, and accepting donations, with the ability to upsell offerings such as movies, theater programs, and the Butterfly Encounter.

On-site, the software must be capable of completing sales on traditional hardware in addition to hand-held devices, with the ability to change access points.

It must be PCI compliant and be able to accept chip & pin cards. Sales should be completed with the traditional payment options, as well as, newer options such as Apple Pay, Samsung Pay, and have the capabilities to interface with any new, up-and-coming payment option.

7. Please identify how your company's product can satisfy the above stated needs or how it would fill in the gaps for where it cannot readily satisfy any of the above stated requirements. Please also share how you believe your system goes beyond the stated requirements and is truly best in class in flexible hardware capabilities and mobile ready device functionality.

Master Calendar & Event Registration

Operationally, the new system must support resource management with space and resource holds, a "Master Calendar" function and a real-time dashboard for customers served and revenue. Ideally, the data would be presented in a succinct and concise manner based on the applied filters to view group reservations, theater offerings, corporate events, vacation/overnight camp reservations & attendance, Outreach reservations and attendance and booked Professional Development event.

8. Please identify how your company's product can satisfy the above stated needs or how it would fill in the gaps for where it cannot readily satisfy any of the above stated requirements. Please also share how you believe your system goes beyond the stated requirements and is truly best in class as a Master Calendar/Resource & Venue management tool.

9. We would like the ability to have web-based forms where users could register for specific events online and through our website into the system. We would like to understand the ability for direct integration into the system as well as a dashboard type interface that would allow an administrator to approve and send confirmation notification to the registrant. Reporting around these events would be critical so that we could track individual event registration as well as rolled up information for specific event types. Please indicate how your product could accomplish these initiatives.

Reporting & Financials

Daily attendance reports and concise financial reporting are paramount to the system. This includes financial reports tailored to specific user requirements, by site/administrative area, as well as reporting for the entire institution. All attendance and financial reports should be sorted by department and by user, with diversity of administrative options: power users, reporters, view-only, etc.

The Connecticut Science Center is a deeply data driven institution. The new system must be able to provide “canned” useful reports pertaining to attendance, demographics, marketing and finance as well the ability to easily construct unique, customizable reports on a regular basis.

Reports must be available by name and event, when appropriate. Ability to pull names of participants, with additional information included, age, grade level, etc.

The system should have the capability to build a connector into the financial system to import daily cash receipts.

10. Please describe your system’s reporting capabilities as it pertains to the needs stated above. Please also describe how your system provides best in class reporting and financial management capabilities.
11. Please distinguish between the native reporting capabilities provided out of the box as well as the methods for developing custom reporting, including the skill sets required to generate custom reporting.

Technology Requirements

12. Define the technology requirements needed to run your company's software platform.
13. Explain how PCI compliance is achieved and how non-credit card information is secured. In addition, explain how security is maintained on remote devices.
14. Explain the disaster recovery plans for transactional data to total loss. How often are these plans tested? Explain how they are tested. Confirm if the Science Center database would be isolated from other client's data.

Support

15. Explain the details of your technical support, offshore or on-shore and the hours. Share all hours that have increased charges, such as holidays, evenings. What is the level of experience of the support team? Does your organization provide a knowledgebase for self-support and troubleshooting? Do you provide support for online issues, payment services and developments? How often are patches released? Do new patches include suggestions from clients?

Fees

16. Please list all fees for the software and associated services required for a full and complete implementation and deployment.
17. What functions are part of the basic software and what functions are purchased modules?
18. What is the reoccurring annual fee for the software?

Training

19. Please describe your company's approach to client training – initial and ongoing. What materials are provided and in what format? What training is provided for clients at setup and on an ongoing basis as part of the sales process? What training tools are provided on a fee for service basis or online?

Miscellaneous / Final RFP Questions
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20. What functions and capabilities are currently in Research & Development for your system and are scheduled for release in the next 6 months? One year? Two years and beyond? What process do you use to identify new features? What is the process for gathering requirements?
21. If awarded, what is your proposed process and schedule for completing this project? Please include information regarding meetings and deliverables for each phase. Describe what kind of meetings you suggest (ie: Skype, on site, GoToMeetings, conference calls, etc...) Outline all training sessions and support during the conversion process and after completion.

SELECTION PROCESS & TIMELINE

Selection Process

All responses to this RFP will be screened by multiple reviewers who will then make recommendations for further action to CSC management.

The CSC reserves the right to reject any and all responses.

Selection Anticipated Schedule

RFP responses due on CSC Property By: **May 10, 2017**

Review & selection of applicants for interview completed By: **May 24, 2017**

Scripted Demo Interviews with selected firms (3 to 5 applicants) **June & July, 2017**

Selection of vendor: **August, 2017**

Note: Notification, interview and selection dates are approximate. The CSC reserves the right to modify the selection process and/or schedule at any time. Successful negotiation of a contract agreeable to CSC is the final selection step. If at any point CSC determines that pursuit of an agreeable arrangement is fruitless, it shall terminate the process and proceed with an alternate applicant.

SUBMITTAL REQUIREMENTS

Requirements

- 8 Copies of RFP Response and Answers to ALL 21 Questions.
- Itemized list of pricing:

Provide a detail list of pricing for software package. Noting the core system and any additional modules. Also, including recurring licensing of users, maintenance/support fees, training, implementation, and consulting.

- References:

Provide at least 3 references (including name, title, address, telephone number and email address) of clients with similar scopes and visitor attendance.

- Contact:

On a single sheet, please provide the following:

- The firm's name
- The firm's contact person
- Address, telephone, fax, email of this contact person
- A list of proposed sub-contractors (if any)

- Budget Information:

Please submit a detailed budget for the work and expenses including:

- Your proposed fees
- Your proposed expenses
- An organization chart showing the level of organizational responsibility of all major participants of your staff who will work on this project
- Estimated timeline from selection through build-out to migration, to beta testing to Go Live (and any important milestones/steps in between.)
- Estimated cost of importing records/data from existing system
- Cost of additional modules for enhanced software functionality
- Estimated cost to build data connectors to existing systems (Raisers Edge and Abila MIP financial System)
- Estimated cost of hardware
- Estimated cost of training
- Estimated cost of ongoing support and service

- Please provide a list of any pending lawsuits, liens and outstanding financial liabilities for your company or a statement that none exist.
- Please provide a copy of your most recent audited financial statement and a copy of the most recent financial statement for your company.

Submission Instructions

All materials must be delivered to:

Ticketing & CRM System RFP
Attn: Claudia Davis
Connecticut Science Center
250 Columbus Blvd.
Hartford, CT 06103

No later than May 10, 2017 by 4:00 P.M. (E.S.T.)

This is not a postmark deadline. All components of all proposals must be received in hard copy at the above address by the date and time listed. Any received after deadline will not be considered. Candidates are strongly advised to use a carrier that will guarantee delivery. The CSC is not responsible for any submissions delayed, lost or damaged in transit.

Communication/Questions

To ensure consistency and fairness in this process, all communication with the CSC must be exclusively through Claudia Davis. All questions must be in written format and can be directed to Claudia Davis at CDavis@CTScienceCenter.org or can be mailed to her attention at 250 Columbus Blvd., Hartford, CT 06103. Any answers that substantively affect the information included in this RFP will be posted on the CSC web site at www.ctsciencecenter.org. It is the candidate's responsibility to check the web site regularly for such information.

GENERAL REQUIREMENTS AND CONDITIONS

1. All proposals in response to this RFP are to be the sole property of CSC.
2. The bidder agrees that the proposal will remain valid for a period of 60 days after the closing date for the submission and may be extended beyond that time by mutual agreement.
3. CSC may amend or cancel this RFP, prior to the due date and time, if the CSC deems it to be necessary, appropriate or otherwise in the best interests of CSC. Vendors will be granted appropriate filing extensions to accommodate any material changes due to the issuing of an amended RFP. Failure to acknowledge receipt of amendments, in accordance with the instructions contained in the amendments, may result in a company's proposal not being considered.
4. The price quoted includes all installation and related out-of-pocket expenses that will be incurred. Cost estimates will be considered as "not to exceed" quotations, except to the extent that the assumed scope is changed, against which time and expenses will be charged. Finally, the price quoted will be applicable to the entire term of the contract and will not be subject to alterations without the prior written consent of CSC.
5. Any costs and expenses incurred by bidders in preparing or submitting proposals are the sole responsibility of the bidder. A bidder, if requested, must be prepared to present evidence of experience, ability, service facilities, and financial standing necessary to satisfactorily meet the requirements set forth or implied in the proposal.
6. No additions or changes to the original proposal will be allowed after submittal. While changes are not permitted, clarification of proposals may be required by CSC at the bidder's sole cost and expense.
7. The bidder represents and warrants that the proposal is not made in connection with any other bid and is in all respects fair and without collusion or fraud. The bidder further represents and warrants that they did not participate in any part of the RFP development process, had no knowledge of the specific contents of the RFP prior to its issuance, and that no agent, representative or employee of CSC participated directly in the bidder's proposal preparation.
8. All responses to the RFP must conform to instruction. Failure to answer all questions or to follow the requested format may be considered appropriate cause for rejection of the response.

9. The contract document will represent the entire agreement between the bidder and CSC and will supersede all prior negotiations, representations or agreements, alleged or made, between the parties. CSC shall assume no liability for payment of services under the terms of the contract until the successful bidder is notified that the contract has been accepted and approved by CSC. The contract may be amended only by means of a written instrument signed by CSC and the bidder.
10. An authorized officer of the company must sign the submitted proposals. Proposals must also provide name, title, address and telephone number for individuals with CSC to negotiate and contractually bind the company, and for those who may be contacted for the purpose of clarifying the information provided.