



**Michigan Science Center Request For Proposals**  
**Ticketing and CRM Platform**  
September 11th 2018

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## **SECTION 1: OVERVIEW**

The Michigan Science Center (MSC) has initiated a Request for Proposal (RFP) process to identify a qualified vendor to provide a ticketing and customer relationship management system to support both earned revenue (walk-in and group general admissions, shows, membership, education programs etc) and contributed revenue (fundraising and development) activities.

MSC is looking for a vendor who can provide the following services:

- Online and in-person ticketing admissions and POS
- Timed ticketing for theaters and shows
- Membership management capabilities
- Customer relationship management for all contacts (prospects, funders, members + visitors)
- Fundraising workflows to manage annual campaigns, capital campaigns, and gala
- Email marketing capabilities (within platform and/or with integration)
- Education program management (camps, labs, offsite-programs, etc.)
- Reporting for both earned and contributed revenue

Additional optional capabilities include:

- Fundraising and prospect research support
- Volunteer management
- Retail management
- Facility rental management

## **SECTION 2: RFP PROCESS**

- **RFP Issued Tuesday, September 11, 2018**
- **All Questions Due Wednesday, September 19, 2018** Please send questions to [samantha.keys@mi-sci.org](mailto:samantha.keys@mi-sci.org) with a cc to [andy.zulkiewski@mi-sci.org](mailto:andy.zulkiewski@mi-sci.org)
- **RFP Due Wednesday, September 26, 2018 by 12:00 p.m. (NOON)** Proposals emailed or electronically delivered to [samantha.keys@mi-sci.org](mailto:samantha.keys@mi-sci.org) with a cc to [andy.zulkiewski@mi-sci.org](mailto:andy.zulkiewski@mi-sci.org)
- **RFP Review: Proposals will be evaluated in the Fall.** Selected companies may be asked to attend an online or in-person presentation for an initial demo or deep dive presentation with our team. Please note all travel expenses to and from Detroit will need to be covered by the company submitting the RFP.
- **MSC expects to begin services with Provider by February 28th, 2019**

### **SECTION 3: ABOUT MICHIGAN SCIENCE CENTER**

The Michigan Science Center is a science and technology museum in Detroit, Michigan with content and programming that reaches audiences across Michigan and beyond. MSC opened December 26, 2012 with a mission to inspire curious minds of all ages to discover, explore and appreciate science, technology, engineering and math in a creative, dynamic learning environment. We are home to the Dassault Systèmes Planetarium; the DTE Energy Sparks Theater; the Chrysler Science Stage; a 8,700-square-foot (810 m<sup>2</sup>) Science Hall for traveling exhibits and hands-on exhibit galleries focusing on space, life and physical science.

In 2017, we reached over 291,000 people with our programming. 199,000 of those individuals took advantage of our programming on-site including our ticketed admissions, free days, theaters, live shows, traveling exhibits, educational programs and after dark events. 92,000 were reached off-site through our traveling science program and other community access and outreach activities. Our primary audience includes families of elementary and middle school students and school groups, although we have programming to cater to all age ranges.

Currently, we have a mixture of full time and part time staff employed at the science center. On our current customer relationship management system, we have 37 user licenses total with access to the software.

### **SECTION 4: SCOPE OF WORK**

**Guiding Principles:** Overall MSC is searching for a technology platform that is cloud-based, easy to access online, has intuitive and easy to use visual interface and requires minimal integrations between ticketing, development, membership and marketing features to address our business requirements.

#### **Key requirements for ticketing and CRM system include:**

- **Ticketing System Requirements:** Selling and processing tickets in-person and online for both non-group and group reservations. Ticketing covers general admissions, shows and special programs like camps.
  - In person ticket sales
    - Ability to easily mark tickets as attended or automatically mark all GA as attended.
    - Automatic application of discounts on things like membership pricing and group discounts to improve efficiency and reduce manual errors.
  - Online ticket sales
    - Ability for online sales for all programming types including field trips, camps, outreach events and memberships is desired. Online ticketing must have if/then logic to control combo packages and other discounts.
  - Minimal tickets and barcodes for packaged tickets
  - Provide scanners for shows
  - Easily changeable ticketing instances on the back-end
  - Group reservation bookings and email confirmations

- Registration pages for education programming, such as camps.
- Provide landing page for online ticket sales
  - Ability to capture customer information that includes name, mailing address, email address
  - Includes print at home delivery options
  - Process payment, accepts MasterCard, VISA, Discover, American Express using processing company
  - Donations or Roundup options in payment process
  - Customer receives a purchase confirmation email – customizable
  
- **Development Requirements**
  - Comprehensive donor/ member profiles with information which can be accessed quickly and easily
  - Secure online donation processing that links to existing donor profiles
  - Ability to automatically generate acknowledgement letters as well as electronic donation acknowledgements and manage process
  - Manage Annual and Capital Campaigns with the ability to generate mailing (snail and electronic) lists based on specific criteria available in donor records
  - Manage Gala Fundraiser activity, ability to sell tickets and process sponsorships online
  - Manage funder renewal process
  
- **CRM Requirements**
  - Track the following information:
    - Names
    - Addresses
    - Relationships / Household (Child, Spouse)
    - Employment
    - Giving History
    - Membership History
    - Purchase History
  
- **Membership Management Requirements**
  - Processing membership cards - easily print cards to an automated template.
  - Member history is ongoing, rather restarting upon renewal
  - Ability to gift a membership.
  - Membership renewal reminders. Automated emails/workflow preferred.
  - Ability for members to login to renew and purchase member pricing.

- **Marketing Requirements**

- Marketing Team will utilize the system to gather patron and donor data to incorporate into e-marketing and social media campaigns, and leverage data to help the marketing team sell more tickets, improve patron retention rates and provide timely and relevant communications to our visitors.
- Relevant marketing functionality includes:
  - Responsive landing pages
  - Online purchasing options
  - Email marketing capabilities – Ideally we can find a system that offers email marketing platform tools, customer history tracking, social media integration and custom confirmation emails. We will also consider platforms with integrations that solve for these requirements.
  - Marketing automation capabilities - Interested in systems with the ability to automate marketing actions, especially email campaigns, and help us nurture prospects with highly personalized, useful content that helps convert prospects to customers and keeps customers coming back. For example, the Michigan Science Center would like to use marketing automation to increase our member retention rate. We would like to send members automatic emails personalized to their buying habits and demonstrating the value of their membership. We will also consider platforms with integrations that solve for these requirements.

- **Reporting Requirements**

- **Overall**
  - Exportable to excel and PDF
  - Viewable online
  - Customizable and editable by at least one key staff person
- **Earned Revenue Reporting**
  - Total earned revenue (including admissions, shows, membership, program revenue) broken out by type available by date range (day, week, month, quarter and year)
  - Total visitors and attendees broken out by type available by date range (day, week, month, quarter and year)
  - Trend reports outlining revenue by day of the week (Monday - Sunday)
  - Membership renewal tracking
- **Contributed Revenue Reporting**
  - Ability to track and report on progress/ success of campaigns
  - Comprehensive reporting, ability to segment our list with customizable fields
  - Total donations secured by date range (day, week, month, quarter and year) and campaign type
  - Prospect tracker

- **Marketing Reporting**
  - Open rate of emails
  - Click through rate of emails
  - List of bounce emails
  - List of opt out emails
  
- **Integrations**
  - Provide integration with FinancialEdge
  - Provide integration with MailChimp if marketing capabilities do not fully replace MailChimp services
  - Indicate integration capabilities with Salesforce (our existing CRM provider)

**Additional optional capabilities MSC may be interested in if included in software include:**

- Fundraising and prospect research support
- Volunteer management
- Retail management
- Facility rental management

**SECTION 5: PROPOSAL TERMS AND CONDITIONS**

All proposals should be received by Wednesday September 26, 2018 by 12:00 p.m. (noon). Any questions about the RFP should be received by Wednesday September 19, 2018.

Submit your proposals by emailing one digital copy to [samantha.keys@mi-sci.org](mailto:samantha.keys@mi-sci.org) with a cc to [andy.zulkiewski@mi-sci.org](mailto:andy.zulkiewski@mi-sci.org).

- All proposals must use the proposal format outlined in this RFP.
- Bidder status: bidder must disclose any relevant conflicts of interest and/or pending lawsuits.
- Please note MSC reserves the right to reject any or all proposals for any reason at its sole discretion.
- Evaluation – All RFP Proposals will be reviewed by a group of MSC staff members and MSC Board Members. When evaluating an emphasis will be placed on ticketing systems and required functionality, and then evaluate additional features separately. The additional features are not required, but are encouraged to add to the RFP.

## **SECTION 6: PROPOSAL FORMAT AND INSTRUCTIONS**

**As part of your proposal, please address the following:**

- **Title Page and Table of Contents:** A title page of the proposal must include company's name, website address, corporate address, and telephone number. Please also include principal contact's name and email address. The proposal should include a table of contents.
- **Executive Summary:** Provide an executive summary of the ticketing and CRM solution and the approach your company plans to take to help MSC meet and exceed our business needs.
- **Company Information**
  - Description of company, core services and firm experience
  - Organization capacity (staff size, location), firm availability and key personnel
  - Two relevant professional references
  - Statement about company's liability insurance and worker's comp coverage.
- **Requirements:** Please address how your company will meet the key requirements outlined in "Section 4: Scope of Work" through your platform and integrations, including:
  - Overview of ticketing point of sale and process
  - Overview of credit card processing and merchant services system
  - Overview of development / fundraising workflows and functionality
  - Overview of membership management functionality
  - Overview of marketing capabilities including online purchasing, responsive landing pages, email marketing and marketing automation
  - Overview of reports available and ability to customize
  - Current integration capabilities to MailChimp, Salesforce, Financial Edge, as well as, any other integrations necessary to meet requirements
  - Additional functionality that MSC may be interested in
- **Timeline and Process:** Please indicate the approach and timeline for setting up MSC on the system including sample schedules, major milestones and beta testing.
- **Cost Proposal:** Outline all fees associated with meeting the requirements laid out in this document and addressing MSC's business needs including:
  - **Annual Fees**
    - Software annual fees
    - All ongoing fees including merchant processor rates and fees
  - **One-Time Fees**
    - Data Conversion
    - Training On Site
    - Training Off Site
    - Hardware provided by Vendor
    - Hardware provided by MSC
  - **Fees associated with Integrations (one-time and ongoing) and/or Additional Optional Functionality**
  - **Schedule of fees and payment options**