

The Stained Glass Museum

Membership, Ticketing, Retail & Fundraising EPOS Request for Proposal

The information contained in these documents is private, confidential and only for the intended recipient and may not be used, published or redistributed without the prior written consent of QLINE Consulting.

All proposals must be submitted no later than
midday on January 11th 2021

All communications and tender responses to:

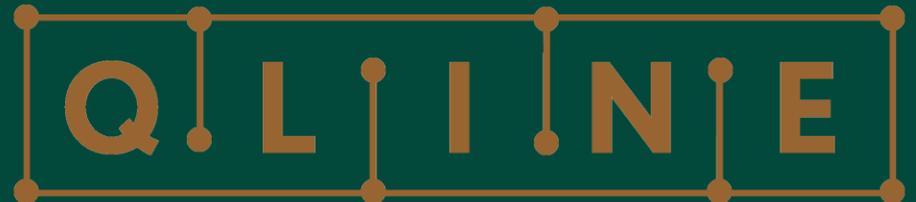
Carly Straughan of QLINE Consulting

07788202551

Carly.Straughan@gmail.com

<http://qlineconsulting.com/>

Please include Ref: SGM01 in the subject line to ensure a timely response.



Contents

1. RFP Overview	3
1.1 The Project Brief.....	3
2. The Proposal	5
2.1 Vendor Selection Timeline.....	5
2.2 RFP Coordination.....	5
2.3 Proposal Preparation Cost.....	5
2.4 Proposal Submittal.....	5
3. Current Overview	7
3.1 Current POS Equipment.....	7
3.2 New System Requirements.....	7
4. Proposal Format	8
4.1 Company Information.....	8
4.2 Company Qualification.....	8
4.3 Company Qualification.....	8
4.4 References.....	9
4.5 Proposed Solution.....	9
4.6 Implementation Approach.....	9
4.7 Ongoing support.....	9
4.8 Pricing.....	10
4.9 Additional Information.....	10
5. Proposal Process	11
5.1 Proposal Communications.....	11
5.2 Evaluation.....	11
5.3 Proposal Withdrawal.....	11
5.4 Proposal Errors.....	11
5.5 Incorrect Proposal Information.....	11
5.6 Right to Refuse Personnel.....	11
5.7 Consultant Participation.....	12
5.8 Conflict of Interest.....	12
6. Contract	13
6.1 RFP and Contract.....	13
6.2 Contract Negotiations.....	13
6.3 Right of Rejection.....	13
6.4 Confidential Information.....	13
6.5 Rights of The Stained Glass Museum.....	13



1. RFP Overview

The Stained Glass Museum is an independent accredited museum and registered charity (CIO 1169842), located in the south triforium of Ely Cathedral (accessed by a staircase of 40 steps). It is a key attraction in the city attracting more than 26,000 visitors each year.

Visitors: Circa 26,000 per annum – 19,000 paying visitors, 7,000 visits to shop/entrance area without entry to the museum. Mainly joint tickets sold via Ely Cathedral POS with no access control or audience data collected for The Stained Glass Museum.

Incumbent Solution: Manual entry of numbers on none networked POS, third-party events and workshops sold via Eventbrite and PayPal used for collecting payment for Friends scheme and online shop sales.

Yearly Tickets: In order to comply with Gift aid regulations all tickets sold by the museum (and joint tickets sol by Ely Cathedral) are valid for re-entry for 1 year from date of sale.

Membership: 250 manually managed, active 'Friends'

Donations: Individual giving and gift aid is managed manually in excel.

Retail Sales: £45,000-£50,000 per annum. Around 1,000 SKUs stocked on a Sale or Return basis. Retail sales are currently manually entered into the till. Stock management and KPIs are currently monitored and managed in excel. Online retail sales are basic and payment is taken via paypal embedded in the current website.

Online sales: All online ticket sales are currently managed by Ely Cathedral and only joint tickets are sold. A manual, visual check is completed by the Stained Glass Museum host and manually keyed into a till to count visitation. Retail sales online are available but basic with no back-office functionality for management of stock or payment reconciliation.

1.1 The Project Brief

The purpose of this RFP is to identify and select a partner to provide a revenue management software and integration to a CRM solution. This will include general ticket sales via box office and online sales, alongside membership management, access control, sales reporting, retail POS and stock management, business intelligence reporting and financial reconciliation.

The selected vendor will be capable providing all the services above and any additional services listed in the requirements section of this RFP. Whilst there is a desire that one single solution can provide all the requirements there is a willing to work with different "best in breed" vendors where an integration is available however this must be under a single contract and SLA.

The scope of services should include all software, hardware, and services required to support the implementation, data migration, support, and ongoing sales.

Required Functionality includes, but is not limited to:

- Front desk ticket sales including Gift Aid data collection and reporting.
- Ability to produce physical media for return visitors as each ticket is valid for 1 year from visit date.
- Online ticket sales including timed and dated tickets including Gift Aid and additional data collection.
- Ability to collect donations online without requirement for a ticket sale or retail purchase.
- Upsell for additional donation and/or product alongside retail and ticketing items.
- Gift Voucher capability for retail and ticket sales.

- Access Control – to assist hosts with identifying those allowed entry on day of purchase and those returning within the year on their ticket purchased previously.
- Automated communications for online ticket and retail sales.
- Reporting on revenue generating activity i.e., split of adult/child visitation and retail reporting including top sellers, top revenue generation.
- Stock Management including sale or return items and one-off items.
- Ability to integrate to Microsoft Dynamics or ability to provide basic CRM functionality built into the POS system i.e., record all donations made by single friend and record all event and workshop attendance for a single customer.
- Provision of an online sales platform that integrates seamlessly into the POS for ease of use for staff and guests.
- Ease of barcoding and scanning products in the retail store.
- Ability to record notes against a retail sale to identify artist responsible for sale to allow for commission to be calculated for one-off retail items.
- Cash handling reporting i.e., daily sales and reconciliation with automated end of day report into CSV format.
- Membership management for 'friends' scheme including joint members, different levels of membership and ability to sell and renew online.
- Ability to collect Direct Debit details or integrate into a DD provider for 'friends' regular payments.
- Ability to collect additional data at all visitor touch points for marketing purposes.
- Ability to output CSV in an appropriate manner to allow upload into QuickBooks on a regular basis.
- Online booking for workshops and events with some additional data capture for high value events.

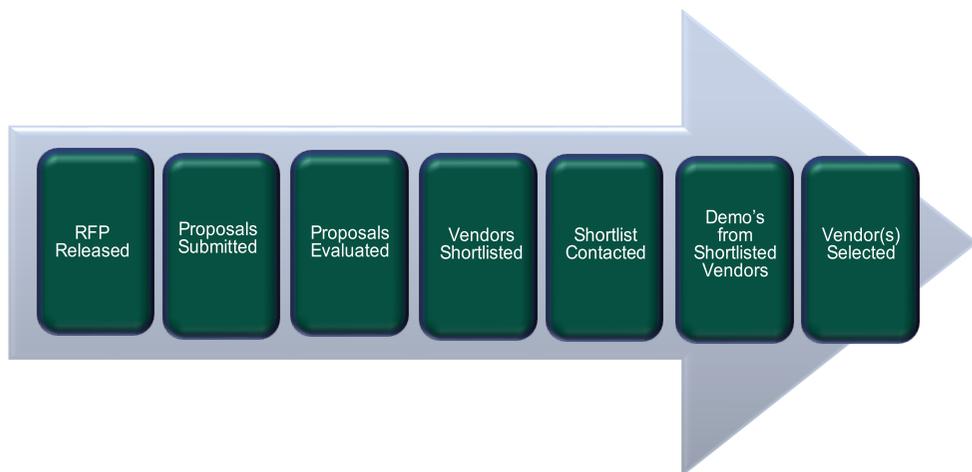
Full Requirements are included alongside this RFP for your completion.

2. The Proposal

2.1 Vendor Selection Timeline

The process outlined in this RFP is designed to select a vendor in January 2021 for implementation completion prior to April 2021.

We understand this timescale is tight and additional resource has been brought in for the museum to oversee this project to ensure it is delivered to time. If there are any concerns about the delivery of this project on the timescale described here please add that to your proposal for us to take into account. This will not disqualify you from the selection process.



The RFP and subsequent evaluation of proposals will allow The Strained Glass Museum to identify a short-list of qualified vendors. Short-listed vendors will be contracted on 20th January 2021

The short-list vendors will then be invited to do an on-site or virtual demonstration as allowed by restrictions at the appropriate time. These demonstrations will take place in the week commencing Monday 25th January

Vendors invited to demonstration will be provided a series of scenarios to perform in advance. We will also provide a listing of desired reports and information resulting from these transactions.

Upon completion of the demonstrations The Stained Glass Museum will make a choice of vendor. The successful vendor will be notified on the 1st February 2021.

Implementation of the system would ideally be in place for Monday 29th March 2021 to allow for staff training prior to the Easter holiday week.

2.2 RFP Coordination

All communications concerning this RFP must be submitted via email to Carly.Straughan@gmail.com. Carly Straughan will be the sole point of contact for this RFP. Unauthorized vendor contact with anyone in The Stained Glass Museum may result in disqualifications of the vendor's bid.

2.3 Proposal Preparation Cost

The Stained Glass Museum will not pay any costs associated with the preparation, submittal, or presentation of any proposal, including preparation and participation at the proof-of-capabilities demonstrations.

2.4 Proposal Submittal

Proposals must be submitted electronically to Carly.Straughan@gmail.com no later than midday on January 11th 2021.

The body of the email should identify the following:

- REF # MHE01
- Name of Vendor
- Vendor's Address
- Vendor's Contact Person
- Vendor's Telephone Number

Carly Straughan, on behalf of The Stained Glass Museum, must receive all proposals by the date and time shown above. Proposals received after this time and date will not be considered.

Vendors are solely responsible for ensuring the proposal is received by The Stained Glass Museum contact prior to the deadline. The Stained Glass Museum will indicate successful receipt of the vendor's proposal with an email reply to the submission email that acknowledges receipt. An automated system generated receipt (e.g., read receipt or delivery receipt) does not constitute proof of successful submittal. Vendors must receive a specific email from the RFP Coordinator confirming receipt.

3. Current Overview

The Stained Glass Museum have a very manual set of systems and processes which are currently used to run their business. Ticket sales are made online via the Ely Cathedral webstore or at the ticket desk of The Stained Glass Museum.

The Stained Glass Museum is located within Ely Cathedral however a ticket to Ely Cathedral is not required in order to visit the Museum. On days when Ely Cathedral is free The Stained Glass Museum still operate a paid ticket system.

Visitors are counted both at entry to the shop and front desk are (circa 26,000 per year) but require a paid ticket to venture further into the exhibition area (circa 19,000 per year).

Currently the retail store and admissions desk are the same POS however there is interest to split these locations slightly to allow for faster processing of sales during peak times. It is not unusual for the physically small space to allow entry to 200+ visitors per day on a peak day and this limited space would benefit from additional sales points.

The Stained Glass Museum operates 363 days per year (Pre COVID) although shorter hours and short term closures are common due to the schedule of Ely Cathedral as a place of worship and historic interest. During 2020 operating hours have been substantially reduce but the goal is to return to pre COVID operating hours ASAP.

Ely Cathedral are currently customers at Spectrix (<https://www.spektrix.com/>) and ideally The Stained Glass Museum would be able to recognise a ticket produced by Spectrix in their own system (only for validity of entry as customer data is owned by Ely Cathedral). For the purpose of this RFP this is not an essential requirement however if this is something you are able to speak to in your response the Stained Glass Museum would be eager to understand the ability to do this in the future.

It should be clear however that Ely Cathedral and The Stained Glass Museum are separate organisations and charities and do not share any system, data or team members.

3.1 Current POS Equipment

The current POS is an unnetworked, analog till which produces a Z read at the end of a trading day and allows for manual entry into a spreadsheet. There is network provision in the POS area allowing for CCTV and access to emails via a PC located in the admissions area. The network speed is as yet untested, this is in the process of being upgraded to support ongoing Microsoft 365 working but should be regarded as basic. There may be scope to improve this if required by the right POS partner.

All reporting and business management is currently undertaken on spreadsheets apart from accounting which is done via QuickBooks software.

With this in mind The Stained Glass Museum will require POS to be provided, preferably on an ownership basis rather than a rental agreement.

There are network points which provide PDQ access today and we would be looking to replace the merchant agreement alongside the POS application and hardware for those PDQ.

3.2 New System Requirements

Attached to this document (on the same email) is an excel document which lists the requirements of The Stained Glass Museum relating to this RFP. It contains a summary of the most common needs, desired features, and requests of the each are of the attractions.

Please describe the full capabilities of your ticketing solution by addressing these needs and answer any questions that the document requests.

These requirements will also form part of the demonstrations as required.

4. Proposal Format

Proposals must be structured, presented, and labelled in the following manners:

- Email declaring your intent to be considered for this RFP
- Table of Contents
- Company Information
- Company Background
- Company Qualifications
- References
- Proposed Solution
- Implementation Approach
- Other Requirements
- Pricing
- Additional Information

Failure to follow the specified format, to label the responses correctly, or to address all of the subsections may, at The Stained Glass Museums sole discretion, result in the rejection of the Proposal.

4.1 Company Information

This section should identify the following:

- The legal identity of the vendor
- A description of the Vendor's background, nature of business, and organizational history.
- Provide the proposal contact name, address, phone number, and email address.
- A statement of how long the Vendor has been building and maintaining the appropriate software, as required by this RFP.
- All subcontractors and associated scope of work.

- If the vendor has filed any bankruptcy or insolvency processing in the last 10 years.
- Identify any mergers, acquisitions, or sale of the vendor company within the last five years. If so, provide an explanation with relevant details.
- Disclose the vendor's annual company revenues and profit for the last 3 company years.
- Identify all office locations and which office location will be responsible for sales, implementation and ongoing support.

4.2 Company Qualification

In this section of the proposal, the Vendor should identify company and staff qualifications and experience in implementing appropriate solutions. More specifically, this section should identify the following:

- Describe your experience with attractions venues
- Describe your experience of providing revenue management and CRM software to tourist attractions with a diverse user base and needs
- Identify your existing client base

4.3 Company Qualification

In this section of the proposal, the Vendor should identify company and staff qualifications and experience in implementing appropriate solutions. More specifically, this section should identify the following:

- Describe your experience with attractions venues
- Describe your experience of providing revenue management and CRM software to tourist attractions with a diverse user base and needs
- Identify your existing client base

4.4 References

References should be from current customers in a comparable industry which we may approach for further information. Please ensure those references are aware that they have been included so we may contact them.

The Vendor must provide at least two references. At least one of the venues should have moved to the software within the past 3 years. The Stained Glass Museum would prefer references from venues with similar requirements.

For each reference the vendor should provide:

- Entity Name
- Contact Information for Named Reference
- Scope of Work Performed
- Project Start and End Dates
- Website URLs

4.5 Proposed Solution

In this section, the Vendor should identify the proposed solutions including the following:

- Provide a comprehensive overview of the solution proposed.
- Provide a written response that addresses each requirement in Section 3 individually. The first sentence of each requirement response should clearly indicate whether the vendor's proposed solution meets, does not meet, or would require customization/3rd party solution.
- Based on the vendors experience propose any additional features and functionality that will enhance The Stained Glass Museums stated goals.

4.6 Implementation Approach

In this section, the Vendor should address the following:

- Provide a project organization chart highlighting the key staff who will be assigned to accomplish the work required by this RFP and illustrating the lines of authority and designate the individual responsible for completion of each service component and deliverable. Provide brief biographies for the project manager and assigned key project personnel.
- Describe your implementation methodology and approach. This includes the tools and techniques that will be used and methodologies that the firm will employ.
- Describe the roles and responsibilities of The Stained Glass Museum and Vendor staff during each stage of implementation. In addition, provide an estimated level of effort for The Stained Glass Museums staff during implementation.
- Provide a project overview that includes deliverables, milestones, and resources required. The Stained Glass Museum seeks an understanding of the work plan that will be followed to ensure success.
- Describe your user acceptance testing methodology and criteria for success. Also, outline the responsibilities of The Stained Glass Museum staff during user acceptance testing.

4.7 Ongoing support

In this section, the Vendor should identify the proposed solutions up to and including the following:

- Provide Describe ongoing support processes, procedures and methods. At a minimum, the description should identify hours of support, methods to access support, after-hours support, response time commitments, and escalation procedures.
- Describe software release/update frequency and procedures to perform updates.
- Describe the associated ongoing service level commitments that ensure a high performing software solution and stable online sales.

- Describe security and disaster recovery processes and procedures.
- Discuss the vendor's philosophy and approach for ongoing research and development to advance the proposed solution and ensure it remains current to evolving technologies and standards.

4.8 Pricing

The Stained Glass Museum is seeking a clear and comprehensive understanding of all costs associated with this implementation and ongoing relationship. In this section, the vendor must itemize all costs.

- Software licenses
- Hardware
- Hosting of retail and ticketing webstore
- Any 3rd party solutions and integrations if required
- Implementation services and project management
- Ongoing support and maintenance
- Optional products and services
- Travel costs for vendor
- Revenue share (if appropriate)
- Any other expense not contemplated herein

4.9 Additional Information

- Please includes any other information you feel pertinent to your application i.e. ability to integrate to Microsoft Dynamics or ability to take in and recognise ticket numbers produced by another system i.e. Ely cathedral Spectrix system.

5. Proposal Process

5.1 Proposal Communications

The Stained Glass Museum reserves the right, at its sole discretion, to request clarifications of proposals or to conduct discussions for the purpose of clarifications with any or all vendors. The purpose of any such discussions shall be to ensure full understanding of the proposals. Discussions shall be limited to specific sections of the proposal identified by The Stained Glass Museum and, if held, shall be after initial evaluations of proposals are complete. If clarifications are made as a result of such discussion, the Vendor shall put such clarifications in writing.

5.2 Evaluation

With Following the initial review, the evaluators will complete a detailed review of vendor proposals. Proposals will be evaluated based on the following evaluation criteria:

- Quality, clarity, and responsiveness of proposal
- Ability to provide a solution that meets the current and future needs of The Stained Glass Museum
- Proven ability to plan, implement, and support the solution
- Demonstrated ability to work in a cooperative and collaborative manner with clients
- Proposed timeline
- Anticipated value and price
- Perceived risk or lack thereof
- Company financial stability
- References for each of the primary product(s) and service(s) proposed
- Results of interviews, demonstrations, and site visits
- Ability to prepare and execute a contract in a timely manner

5.3 Proposal Withdrawal

To withdraw a proposal, the vendor must submit a written request, signed by an authorized representative, to the RFP Coordinator. After withdrawing a previously submitted proposal, the vendor may submit another proposal at any time up to the deadline for submitting proposals.

5.4 Proposal Errors

Vendors are liable for all errors or omissions contained in their proposals. Vendors will not be allowed to alter proposal documents after the deadline for submitting a proposal.

5.5 Incorrect Proposal Information

If the RFP coordinator determines that a vendor has provided, for consideration in the evaluation process or contract negotiations, incorrect information which the vendor knew or reasonably should have known was materially incorrect, that proposal will be determined non-responsive, and the proposal will be rejected.

5.6 Right to Refuse Personnel

The Stained Glass Museum reserves the right to refuse, at its sole discretion, any subcontractors or any personnel provided by the prime contractor or its subcontractors. The Stained Glass Museum reserves the right to interview and approve vendor's key staff.

5.7 Consultant Participation

The Stained Glass Museum reserves the right to share with any consultant of its choosing this RFP and proposal responses in order to secure a second opinion. The Stained Glass Museum may also invite said consultant to participate in the Proposal Evaluation process and implementation of the project.

5.8 Conflict of Interest

By submitting a response to the RFP, the vendor certifies that no amount will be paid directly or indirectly to an employee or official of The Stained Glass Museum as wages, compensation, gifts, or other compensation in exchange for acting as an officer, agent, employee, subcontractor, or consultant to the vendor in connection with the procurement under this RFP.

6. Contract

6.1 RFP and Contract

This RFP and the successful proposal will be incorporated into the final contract.

6.2 Contract Negotiations

After a review of the proposals and completion of the reference checks, interviews, and demonstration, The Stained Glass Museum intends to enter into contract negotiations with the selected vendor. These negotiations could include all aspects of services and fees. If a contract is not finalized in a reasonable period of time, The Stained Glass Museum may open negotiations with the next ranked vendor or reject all proposals and reissue the RFP.

6.3 Right of Rejection

The Stained Glass Museum reserves the right, at its sole discretion, to reject any and all proposals or to cancel this RFP in its entirety.

Any proposal received which does not meet the requirements of this RFP may be considered to be nonresponsive, and the proposal may be rejected. Vendors must comply with all of the terms of this RFP and all applicable State laws and regulations.

Vendors may not restrict the rights of The Stained Glass Museum or otherwise qualify their proposals. If a vendor does so, The Stained Glass Museum may determine the proposal to be a nonresponsive counteroffer, and the proposal may be rejected.

The Stained Glass Museum reserves the right, at its sole discretion, to waive variances in technical proposals provided such action is in the best interest of The Stained Glass Museum. Where The Stained Glass Museum waives minor variances in proposals, such

waiver does not modify the RFP requirements or excuse the vendor from full compliance with the RFP.

6.4 Confidential Information

All proposals and other materials submitted in response to this RFP procurement process become the property of The Stained Glass Museum. Selection or rejection of a proposal does not affect this right. All proposal information, including detailed price and cost information, will be held in confidence during the evaluation process.

For the purpose of this agreement “confidential information” shall include all information or material that has, or could have, commercial value for either disclosing party.

Each of the parties in this agreement intends to disclose confidential information to the other party for purposes of responding to and evaluating the RFP proposal. The recipients agree not to use this information for any purpose other than to respond to or evaluate this RFP proposal and undertakes not to disclose the enclosed information to any third party.

On request each party may make a request for the return all copies and records of the confidential information and each party will not retain any copies or records shared by the other party.

Nothing in this agreement will prevent the recipient from making any disclosure of the confidential information required by the law or any legal authority.

6.5 Rights of The Stained Glass Museum

The Stained Glass Museum reserves the rights to

- Make the selection based on its sole discretion
- Reject any and all proposals
- Issue subsequent Requests for Proposals

Information contained in this document is private and confidential and is to be used to support the completion of this RFP only.



- Postpone opening proposals if necessary, for any reason
- Remedy errors in the Request for Proposal process
- Approve or disapprove the use of particular subcontractors
- Negotiate with any, all, or none of the vendors
- Accept other than the lowest offer
- Enter into an agreement with another vendor in the event the originally selected Vendor defaults or fails to execute an agreement with The Stained Glass Museum
- An agreement will not be binding or valid with The Stained Glass Museum unless and until it is approved by The Stained Glass Museum.