



**CITY OF LA MIRADA
REQUEST FOR PROPOSALS (RFP)
BOX OFFICE/TICKET MANAGEMENT/CUSTOMER RELATIONSHIP MANAGEMENT
SYSTEM**

October 28, 2016

RFP SUBMISSION DEADLINE: November 28, 2016 at 4:00 P.M.

SUBMIT PROPOSAL TO:
City Clerk Anne Haraksin
City of La Mirada
13700 La Mirada Boulevard
La Mirada, California 90638

For questions or clarification, contact:
ecarlock@lamiradatheatre.com
(562) 902-2922

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INTRODUCTION

The City of La Mirada is committed to ensuring the highest level of service to its residents. This is consistent with the City’s motto “Dedicated to Service”.

The City of La Mirada is currently soliciting comprehensive proposals for a complete Box Office/Ticket Management/Customer Relationship Management (CRM) Software system for the La Mirada Theatre for the Performing Arts, including software solution, installation, training, support, specified hardware and implementation.

The City of La Mirada/La Mirada Theatre for the Performing Arts seeks a vendor with proven record of providing versatile event ticketing, event access control, fundraising/customer relationship management, e-commerce and reporting systems to a performing arts center while also meeting our demands for quality technical support, ease of use and user-friendly training. The La Mirada Theatre also wants a system that is capable of supporting us now and in the future as we continue to grow.

The City of La Mirada/La Mirada Theatre will consider solutions that operate either in an in-house/licensed environment, a hosted/outsourced environment, as an application service provider (ASP), or a hybrid variation. If it appears that more than one solution, hosting type, or project approach that will meet the needs of the Theatre, each solution must be proposed separately so that the Theatre can compare and contrast each proposal on its own merits. If necessary, the primary vendor may joint venture or subcontract with professional service consultants and/or other vendors; but any such ventures must be clearly identified in the proposal.

The system is to be supported by an accessible, dedicated support team with a clearly described, established customer problem ticket resolution process for receiving, tracking, prioritizing, escalating and resolving issues as may come up with a “24/7/365” type internet based sales and service system as is common in the ticketing industry.

Project Objectives

Through the implementation of the Ticketing Management Software, the City/Theatre hopes to:

- Automate and improve its ability to effectively and efficiently serve our customers through the use of technology.
- Improve operational efficiencies throughout the organization.
- Reduce overall operational costs.
- Increase online ticketing sales and use of social media.
- Increase available functionality for productions and rentals alike to support marketing/fundraising campaigns.

SUMMARY OF TENTATIVE KEY DATES

- Release of RFP: October 28, 2016
- Deadline for submitting questions: November 21, 2016 by 4:00 P.M.
- Deadline for submitting proposals: November 28, 2016 by 4:00 P.M.
- City/Theatre review of proposals: November 29 to December 2, 2016

- City/Theatre interviews final candidates: December 5 to December 9 2016
**The top candidates will be invited to participate in an interview where they will demonstrate their proposed solution to a committee of staff and answer questions.*

- Recommendation to City Council: December 13, 2016
**The vendor recommended by staff may give a presentation of their solution at a meeting of the City Council.*

- Project Implementation: April 21, 2017

The deadline to submit proposals is November 28, 2016 at 4 p.m. Late RFPs will not be considered or returned.

Deliver Proposals to:
City Clerk Anne Haraksin
City of La Mirada
13700 La Mirada Boulevard
La Mirada, California 90638

Submit questions to:
Elizabeth Carlock
Phone: (562) 902-2922
ecarlock@lamiradatheatre.com

BACKGROUND INFORMATION

The La Mirada Theatre has been using the current Ticketing Management Software since June 2013. The Ticketing Management Software includes modules for Ticketing, Fundraising, Customer Relationship Management and Marketing.

The Theatre hosts approximately 230 events a year, selling approximately 118,000 tickets, generating approximately \$4.3 million in sales annually. There are currently 156,199 individual contacts and 144,797 accounts. In Fiscal Years 14-15 the Theatre received \$27,286.05 in contributions from 425 patrons. The Theatre currently has 21 full licenses for the current Ticketing Management Software and 17 limited use licenses.

SYSTEM SPECIFICATIONS

Questions related to the City's desired CRM system specifications and requirements are contained in **Attachment A: Questionnaire**. Vendors must fill out and return the questionnaire with their proposals. Responses to this questionnaire will be evaluated by the City's selection committee

SERVICES TO BE PROVIDED

The successful vendor will be required to provide the following set of deliverables for the Ticketing Management Software (TMS). These items should be addressed in the vendor's proposal.

- A detailed list of the modules and functionality included in the proposed TMS
- Recommended hardware, software, and architecture to support the proposed TMS
- A detailed, phased implementation and deployment plan including data conversion
- A strategy to provide a complete range of system testing to verify performance
- A detailed training plan and training materials
- A complete set of documentation including:
 - Project management materials
 - Status reports
 - Issues log
 - Risk mitigation assessment
- A detailed set of the Vendor's policies and procedures as they pertain to the use of the proposed TMS
- Software licensing plan, including all costs related to deployment and licensing options

Project Plan and Management.

The successful Vendor shall provide extensive project management for the implementation of the proposed TMS. Vendor is expected to guarantee the successful, timely completion of those aspects of the project over which it has control.

Vendor must provide a project plan for achieving the objectives of the project including an explanation of the role of all vendor personnel, the role of City of La Mirada/La Mirada Theatre staff (including time commitment), and an overall project timeline. A description of a recommended team structure (including an organizational team chart), listing key personnel functions, staffing profiles and responsibilities to software set-up and implementation, data conversion, training, and support should also be included. The detailed plan must thoroughly discuss how the vendor will successfully implement the proposed TMS requirements.

Key components to include in the project plan shall include estimated timeframe, overview of deliverables, assumptions, and assumed vendor and city responsibilities.

The vendor shall provide a qualified Project Manager who will be responsible for overseeing all aspects of the services to be provided to implement the proposed TMS. The Project Manager shall serve as the vendor's primary contact for management and administration of the project. The Project Manager shall not be replaced by the Vendor without prior written approval by the Theatre.

The primary duties of the Project Manager include, but are not limited to:

- a. Create and provide a project plan and a master project schedule with identified milestones
- b. Facilitate communication among project team members
- c. Make commitments and decisions on behalf of the vendor team
- d. Implement changes to the project plan
- e. Manage project progress, including issues and potential schedule changes
- f. Attend and participate in progress review meetings
- g. Provide bi-weekly status reports

Training Requirements

The successful vendor shall provide the Theatre with a comprehensive training program to assist with the facilitation and development of end-user training for the implementation of their proposed TMS. Initially, training shall be provided on-site, in a leader-led, classroom format for a minimum of 1 week. The vendor shall include in the response a training design document that defines the approach, delivery, and timing of the proposed TMS training. Adequate training is required.

The vendor shall deliver a training program that is an efficient use of employee time and effective in the transfer of practical knowledge about the use of the proposed TMS. As a general approach, the vendor shall propose an approach that includes significant opportunity for knowledge transfer throughout implementation and enhanced system acceptance by the use and development of "power users" for each pilot team. Such training would include assistance in transfer of existing data to new system, technical troubleshooting, manager training, and complete user operation packages.

The training plan shall support the following user groups:

1. System Administrators
2. End-Users (Management)
3. End-Users (Departmental users)

Key factors in an effective training program are expected to include:

- The principal classroom instructors provided by the successful vendor shall have had previous classroom instructor training and relevant experience with the software and hardware.
- Instructors shall demonstrate a thorough knowledge of the material covered in the courses and familiarity with the training manuals, system documentation tools, and training aids used in the courses.
- The Theatre has the right to video record, for internal use only, all training sessions. These materials are valuable in refresher training and follow up training. All training

aids, materials, and recordings prepared to accomplish this service become the property of the Theatre.

- Power User training will cover the entire system with in-depth sessions for each functional area. Training will be provided for a System Administrator and back up who will be responsible for all system functions.
- End user training will be focused on functional positions and workflow processes. All personnel comprising a specific functional position in a department will be trained on the system's use specific to their needs.
- Training shall be provided in the use of all report and query functions for users who will be creating and modifying reports.

Train-the-Trainer training should prepare Theatre personnel to lead, facilitate, and deliver the leader-led components of the training. This course will provide Theatre personnel with all the required tools, templates, etc. to deliver the training to their colleagues.

Quick reference guides which provide instruction to basic, often used functions shall be provided.

Ongoing Service and Upgrades

Following expiration of any warranty period, the selected proposer will be required to provide maintenance services, including, but not limited to, telephone and online technical and user support, as well as on-site services if necessary.

SELECTION PROCESS

Staff will review the responses and make a recommendation to the City Council for approval (tentatively scheduled for December 13, 2016). The City intends to evaluate the proposed services based on the data presented in response to the RFP. The following general selection criteria will be used to evaluate each proposing vendor:

Evaluation Criteria

- Ability to meet services requirements; understanding the needs and requirements of the City/Theatre; scope and services offered.
- Experience, qualifications and knowledge of TMS solutions; increased functionality and ability to improve operational efficiencies while reducing operational costs; increased online sales, use of social media, and support for productions and rentals.
- References for similar work completed with the last year.
- Proposed pricing.
- Completeness of responses to the Request for Proposals.

GENERAL INTRUCTIONS TO VENDORS

1. Proposals.

All proposals must include the following:

- Cover letter summarizing the vendor's organization, staff, and proposal.
- Description of the vendor's deliverables (i.e. initial setup, project plan and timeline, training, customer and technical support, etc.).
- The names of individuals and/or any subcontractors who will be providing services and their area of responsibility.
- Specific experience of each vendor's personnel in providing similar services.
- **Completed Questionnaire (Attachment A).**
- **Completed Costs and Fees Proposal (Attachment B).**
- **Reference Sheet (Attachment C).**
- Copy of any and all relevant certifications and/or licenses.

The RFP shall be professionally prepared. The report should be organized, clear and edited for basic mistakes. Contractor shall provide two (2) copies of their response to the RFP.

2. Receipt of Proposals.

2.1 Proposals will be received by the City until the time specified in Summary of Key Dates. Proposals must be received by the specified time in order to be considered, and proposals submitted after this closing time will not be considered. Proposal documents must be submitted to the office of the City Clerk at La Mirada City Hall, 13700 La Mirada Boulevard, La Mirada, California **by 4 p.m. (City Hall receptionist clock time) on November 28, 2016.** The City will not accept fax or emailed proposals. The City Clerk time stamp shall be conclusive as to the date and time of proposal receipt.

2.2 Proposals submitted shall be enclosed in a sealed envelope, addressed to: City Clerk Anne Haraksin, City of La Mirada; 13700 La Mirada Boulevard, La Mirada, California 90638. All bid submissions must be clearly marked in the lower left hand corner: **"RFP – Box Office/Ticket Management/Customer Relationship Management Software Replacement Project"**. Vendors must also include their company name and addresses on the outside of the envelope.

2.3 Vendors are responsible for making certain proposals are actually delivered to the City Clerk or designee. Mailing of proposals does not insure that the proposal will be delivered on time or delivered at all. If Vendor does not hand deliver their proposal, it is suggested that he/she use some sort of delivery service that provides a receipt.

2.4 Proposal may be withdrawn prior to the deadline for submission of RFP documents. Any proposal received after the time and date specified will not be considered.

2.5 California Public Records Act. RFP submissions are not to be marked as confidential or proprietary. Submissions in response to this RFP are subject to public disclosure as permitted by the California Public Records Act, after a vendor is selected for contract award, or all RFP submissions are rejected. Additionally, all submissions shall become the property of the City and shall not be returned. The City reserves the right to make use of any information or ideas in the submitted proposals.

Regardless of any identification otherwise, including marking some or all pages as “confidential” or “proprietary,” information in submissions shall become a part of the public record and subject to disclosure without any further notice to the vendor. The City shall not in any way be liable or responsible for the disclosure of any such information.

3. Requests for Information.

3.1 Vendors having any questions regarding the meaning of any of the specifications or terms and conditions shall submit these questions to the City as stated in the Summary of Key Dates. Any and all interpretations or supplemental instructions, if issued, will be sent to all vendors who have theretofore submitted a response to the RFP. **All requests for additional information or clarification concerning this RFP must be submitted in writing by the deadline for submitting questions specified on page 3.**

3.2 The City shall not be responsible for any oral interpretation of any of the specifications made by any person. Official interpretations will be in the form of an addendum or addenda. Applicable addendum(s), if any are issued, will be posted on the City’s website; but it shall be the vendor’s responsibility to make inquiry as to addenda issued. All such addenda shall become a part of the resulting contract and all vendors shall be bound by such addenda whether or not received by the vendor.

3.3 Vendors shall acknowledge receipt of any addendum to this RFP by submitting only the *Signature/Acknowledgement Page* of the addendum. The *Signature/Acknowledgement Page* shall be submitted to City as part of the Vendor’s response. Failure to provide the *Signature/Acknowledgement Page* as received may result in the rejection of the RFP submission. A vendor shall not be relieved of its responsibility to apply addendum information to its proposal. The City shall not be bound by any oral representation or discussion concerning the proposal documents or work unless such oral representation or discussion is confirmed in writing as an addendum.

4. Award/Rejection.

The City reserves the right to reject any or all submissions to this RFP for any or no reason, and to waive any informality or irregularity in any submission received and to be the sole judge of the merits of the respective proposals received. The award, if made, will be to the vendor whose proposal best meets the needs of the City based upon criteria described herein.

The City also reserves the right to reject submissions from any vendor who has previously failed to perform properly or to complete work or contracts of a similar nature on time.

Where only one responsive proposal is received, the City may negotiate price with the sole responsive vendor, it may reject the proposal, conduct a new RFP process, or cancel the RFP.

5. No Contact Policy.

After release of this RFP, no officer, employee, agent, or representative of the Vendor shall have any contact or discussion, verbal or written, with any members of the La Mirada City Council, City staff or City's consultants, directly or indirectly through others, seek to influence any City's Council members, City staff, or City's consultants regarding any matters pertaining to this RFP, except as herein provided.

6. Submissions from Related Parties/Multiple Proposals Received from One Vendor.

When two or more related parties each submit a response to this RFP or multiple submissions are received from one vendor, for any contract, such submissions shall be judged non-responsive. Related parties mean vendors or the principles thereof, which have a direct or indirect ownership interest in another vendor for the same contract, or in which a parent company (or any of its principals) of one vendor have a direct or indirect ownership interest in another vendor for the same contract.

7. Expenses Incurred.

All expenses incurred in the preparation and submission of a response to this RFP shall be borne by the vendor.

8. Examination of Documents and Requirements.

8.1. Each vendor shall carefully examine all RFP documents and thoroughly familiarize itself with all requirements prior to submitting a response to ensure that the goods or services being proposed meet the intent of these specifications.

8.2. Before submitting a response, each vendor shall be responsible for making all investigations and examinations that are necessary to ascertain conditions and requirements affecting the requirements of this RFP. Failure to make such investigations and examinations shall not relieve the Vendor from obligation to comply, in every detail, with all provisions and requirements of the RFP.

9. General Terms and Conditions.

The agreement the selected vendor shall be required to execute will include provisions reflecting the requirements of this RFP. Terms included in the agreement to be executed by the vendor include, but are not limited to, provisions identical or substantially similar to, or that incorporate, the following:

9.1. Permits, Fees, and Notices. The vendor shall, at vendor's own expense, obtain all permits and licenses (including City Business License) required in

performance of this work, and give all notices necessary in the prosecution of this work. The current cost of a business license is \$50.

- 9.2. Insurance. Prior to the beginning of and throughout the duration of the work, vendor and its sub-vendors shall maintain insurance in conformance with the requirements set forth below. Vendor will use existing coverage to comply with these requirements. If that existing coverage does not meet the requirements set forth herein, vendor agrees to amend, supplement or endorse the existing coverage to do so.

Vendor acknowledges that the insurance coverage and policy limits set forth in this section constitute the minimum amount of coverage required. Any insurance proceeds available to vendor or its sub-vendors in excess of the limits and coverage identified in this Agreement and which is applicable to a given loss, claim or demand, will be equally available to City.

- a. The vendor agrees to maintain **workers compensation, and commercial general and automobile liability**, providing protection against liability for injuries, death, property damage and/or other loss, and in connection therewith, shall provide the City with a written Certificate of Insurance evidencing such liability coverage with limits in the minimum amount of One Million Dollars (\$1,000,000) per occurrence.
- b. The vendor agrees to maintain **Professional Liability** or **Errors and Omissions insurance** as appropriate shall be written on a policy form coverage specifically designed to protect against acts, errors or omissions of the consultant and "Covered Professional Services" as designated in the policy must specifically include work performed under this agreement. The policy limit shall be no less than \$1,000,000 per claim and in the aggregate. The policy must "pay on behalf of" the insured and must include a provision establishing the insurer's duty to defend. The policy retroactive date shall be on or before the effective date of this agreement.

If coverage is maintained on a claims-made basis, Consultant/Vendor shall maintain such coverage for an additional period of three (3) years following termination of the contract.

The City reserves the right at any time during the term of the contract to change the amounts and types of insurance required by giving the vendor a ninety (90) day advance written notice of such change. If such change results in substantial additional cost to the vendor, the City and vendor may renegotiate vendor's compensation.

- 9.3. Compliance with Law. Vendor warrants that it will comply with all applicable Federal, State, and local laws, ordinances, rules and regulations applicable to its performance, including but not limited to, all environmental laws and regulations,

- the Fair Labor Standards Act of 1938, as amended, the Equal Employment Opportunity Clause prescribed by Executive Order 11246 dated September 24, 1965 as amended, and any rules, regulations or orders issued or promulgated under such Act and Order. Vendor shall indemnify and save and hold the City free and harmless with respect to, any and all claims, damages, demands, costs and losses which the City may suffer in the event that Vendor fails to comply with any such law, regulation, Act, Order, rules, regulations or orders. Any clause required by any law, ordinance, rule or regulation to be included in a contract of the type evidenced by this document shall be deemed to be incorporated herein.
- 9.4. Indemnification. Vendor shall indemnify, defend, and hold the City of La Mirada, its elected officials, officers, employees, agents and volunteers (the “Indemnitees”) free and harmless with respect to all claims, suits, actions, liabilities, expenses and/or costs of any kind, whether actual, alleged or threatened, actual attorney’s fees incurred by the City, court costs, interest and defense costs including expert witness fees, where the same arise out of or are connected with, in whole or in part, the acts or omissions of vendor or any of vendor’s officers, agents, employees, in the performance of this Agreement, including any acts or omissions constituting a violation of any environmental or other regulation, law or statute, and which result in death, personal injury or property damage to any individual or entity, including the employees or officials of vendor, or which result in any financial loss of any nature to any of the Indemnitees, excepting only such claims and liabilities that arise solely out of the City’s active negligence. Vendor’s indemnity obligations hereunder also include indemnifying and holding the Indemnitees free and harmless from any and all stop notices or any other kinds of liens, and for claims that prevailing wages have not been paid, as required by law.
- 9.5. Nondiscrimination. It is the policy of the City that, in connection with all work performed under contracts, there be no discrimination against any prospective or active employees engaged in the work because of race, color, ancestry, national origin, religious creed, sex, age, physical or mental disability, medical condition, sexual orientation or marital status, except as provided in Government Code Section 12940. The vendor agrees to comply with applicable Federal and California laws, including but not limited to, the California Fair Employment Act, beginning with Government Code Section 12900 and Labor Code Section 1735 and the Americans with Disabilities Act of 1990 (42 U.S.C, Section, 12101 et seq.), as the same may be amended from time to time. In addition, the vendor agrees to require like compliance by any sub-vendors employed on the work by such vendor.
- 9.6. Contract Price and Payment. Payment to the vendor shall be made in accordance with the agreed-upon rates, subject to the submittal of the final invoice(s) by the vendor for work actually performed/deliverable services, as verified by the City Manager or designated representative.
- 9.7. Damage to Property. Property, facilities or equipment damaged or altered in any way during the performance of work by vendor shall be reported by the vendor, in

writing, to the City Manager; and, such property, facilities or equipment shall be promptly restored to its original condition at the expense of the vendor and to the satisfaction of the City.

10. Qualifications for Vendors.

- 10.1. The vendor may be required before the award of any contract to show to the complete satisfaction of the City that the vendor or his/her sub-vendor(s) has the ability, and financial resources to provide the goods or service specified therein. The vendor may also be required to give a past history and references in order to satisfy the City in regard to the vendor's or his/her sub-vendor's qualifications.
- 10.2. The City may make whatever investigation it deems necessary and proper to determine the ability of the vendor or his/her sub-vendor(s) to perform the work, and the vendor shall furnish to the City all information for this purpose that may be requested. The City reserves the right to reject any submissions to the RFP if the evidence submitted by, or investigation of, the vendor fails to satisfy the City that the vendor or his/her sub-vendor(s) is properly qualified to carry out the obligations of the contract and to complete the work described herein. Evaluation of the vendor's or his/her sub-vendor's qualifications shall include:
 - a. The ability, capacity, skill and financial resources to perform the work or provide the goods or service required,
 - b. The ability of the vendor or his/her sub-vendor(s) to perform the work or provide the goods or service promptly or within the time specified, without delay or interference,
 - c. The reputation, judgment, experience, and efficiency of the vendor or his/her sub-vendor(s),
 - d. The quality of performance of previous contracts or services.

11. Disclosure.

If the vendor submitting this response to the RFP has been debarred, suspended or otherwise lawfully precluded from participating in any public procurement activity, including being disapproved as a subcontractor with any Federal, state or local government, or if any such preclusion from participation from any public procurement activity is currently pending, the vendor shall fully explain the circumstances relating to the preclusion or proposed preclusion in the proposal. The vendor shall include a letter with its proposal setting forth the name and address of the government entity, the effective date of this suspension or debarment, the duration of the suspension or debarment, and the relevant circumstances relating to the suspension or debarment. If suspension or debarment is currently pending, a detailed description of all relevant circumstances including the details enumerated above shall be provided.

12. Non-Collusion.

The vendor shall not engage in collusion or other anti-competitive practices in connection with the preparation or submission of its proposal.

13. Offer Acceptance Period.

All RFP submissions shall remain open for 120 days after the day of the opening of the proposals, but the City may, at its sole discretion, release any vendor and return the security (if applicable) prior to the date. No vendor may withdraw its offer during this period without written permission to the City. Should any vendor refuse to enter into a contract, under the terms and conditions of the procurement, the City may retain the security (if applicable), not as penalty, but as liquidated damages.

14. Change Orders.

No oral statement of any person shall modify or otherwise change, or affect the terms, conditions or specifications stated in the resulting agreement, if any. All change orders to the Agreement shall be made in writing.

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ATTACHMENT A **QUESTIONNAIRE**

Vendors must fill out and return this questionnaire with the proposal. Responses to this questionnaire will be evaluated by the City’s selection committee. This questionnaire will provide the City’s selection committee with insight into the proposed TMS solution.

The following alpha codes are referenced in the requirements table below:		
Y	Yes, feature is currently supported by software	
N	No, feature is not currently supported by software	
C	Custom development for implementation would be required by Respondent.	
F	Future feature will be supported by Respondent. Provide anticipated date of availability.	
	Y/N/C/F	Comments
Required Ticketing Management System Functions		

The following modules and/or functions are required of any Ticketing Management System proposed:

1.	Infrastructure		
1.1.	System uses a single database for online and in-house sales and CRM/Marketing		
1.2.	Multi-focused - supports Arts, music concerts, rentals – Performing Arts Center environment		
1.3.	Includes PCI compliant Credit Card processing for Visa, MasterCard, Discover, and American Express		
1.4.	Include EMV compliant Credit Card processing.		
1.5.	Transactions and payment processed in local time zone		
1.6.	Robust Test or training environment that emulates live environment		
1.7.	Allows multiple concurrent user logins		
1.8.	Supports multiple box office locations.		
1.9.	Sell physical tickets outside box office (e.g., wireless printing at remote locations)		
1.10.	Allows smartphone ticket purchase		
1.11.	Allows smartphone ticket delivery		
1.12.	Database must be sized to hold existing data and allow for robust growth.		
1.13.	City of La Mirada retains ownership of all data.		
2.	Ease of Use		

2.1.	Each staff member will have their own unique system login and password.		
2.2.	Ability to look up patrons by phone number, name, e-mail address, postal code, company name, credit card by transaction, etc., quickly and efficiently		
2.3.	Smart search functionality		
2.4.	Easily navigable interface that still provides a deep level of detail when needed		
2.5.	Staff can easily set up and modify event in system for internal and web usage without needing to know HTML, CSS or other web design tools		
2.6.	Show set-up from master templates can be done quickly via cut & paste or multi-show date entry or some other automation for event creation		
2.7.	Does your training program include training for administrators, technical support staff, and end users? Please describe		
2.7.	Does the proposed software have hands-on demos online		
2.8.	Does the proposed software have online training		
2.9.	Does the proposed software have active online User Group(s)		
2.10.	Is documentation provided for the end user with your software? Is documentation provided for the system administrator with your software/ Please describe your documentation		
3.	Patron Data Base Management Criteria		
3.1.	Patrons should be traceable entities within the system. The box office should have easy access to a patron’s ticketing and purchase history and be able to easily edit the patron’s information.		
3.2.	Recognizes potential duplicate patron accounts at online account login or box office POS		
3.3.	Robust duplicate patron account management		
3.4.	System must be able to distinguish between subscribers, donors, staff, and more, and identify patrons as such when queried and during ticket orders		
3.5.	Tracks patron history of purchases, contributions, seat selections, gifts, correspondence, customer service issues, etc.		

3.6.	Look up patrons and accounts using multiple methods of queries (i.e. by name, account number, phone number, credit card numbers, etc.)		
3.7.	Real-time data capture		
3.8.	Build patron profiles and capture patron data, create patron histories and preferences		
3.9.	Handle multiple patron names, addresses and/or phone numbers within a single patron account		
3.10.	Attach notes to patrons providing useful information for future encounters (CRM functionality)		
3.11.	Search and report on who is in which seat, by name, in real time.		
3.12.	Real-time notification of arrival of VIP patron		
3.13.	Alert system for patron accounts – identifies specific patron types like Major donor, or bad credit risk, etc.		
3.14.	Track patron history and preferences		
3.15.	Able to attach documents (letters, emails, contracts) to a patron account		
3.16.	Tracks user message (email/text) preferences including tools to meet regulations around privacy and spam		
4.	Ticket Functionality		
4.1.	Allows unlimited number of venues and maintains a library of houses and multiple layouts per house		
4.2.	General Admission seating offered		
4.3.	Reserved seating offered		
4.4.	Full tracking of all ticket related activity		
4.5.	Alert text events for staff to easily view important information like parking, traffic and event specific special information		
4.6.	Uses "shopping cart" to capture multiple transactions across multiple venues and events in one (1) transaction and one single payment if they choose.		
4.7.	Viewable, easy to read seating charts		
4.8.	Seating charts should be configurable to select whether or not to allow single tickets to be created when reserving tickets		

4.9.	Seating charts show detailed information for staff when they mouse over a seat		
4.10.	Seats can be flagged for various reasons that affect how or when they are sold (i.e.: accessible, obstructed, open captioned location)		
4.11.	Seat history tracks patrons, holds and status changes by seat		
4.12.	Reserved unpaid seats easily visible from the seating chart and in reporting		
4.13.	Interactive event calendar links to all events on selected day		
4.14.	Easily reserve unlimited number of seats in a single pass (i.e. group sales)		
4.15.	Create and manage waiting lists		
4.16.	If tickets become available, is the ticket reserved for the first person on the waitlist automatically? Is there an alert to notify staff automatically when tickets become available when there is a wait list?		
4.17.	Easy navigation between events, easy to access events in variety of methods – list, calendar		
4.18.	Easily process single transactions with multiple payments, multiple payment types, scheduled payments and/or donations		
4.19.	Accept and manage scheduled payments/installments for subscribers, group sales		
4.20.	Allow orders to be adjusted with partial payments applied (i.e. reduce the number of seats being held for a group sale)		
4.21.	Accept payments from multiple patrons in a single transaction with appropriate security/PCI measures in place		
4.22.	All transactions authorized and logged in real-time		
4.23.	Exchange tickets in a new order or original order		
4.24.	Manages Refunds		
4.25.	Refund to original payment method including credit cards even if multiple payment methods are used or tickets are exchanged		
4.26.	Allows pro-rated refunds on subscriptions, group sales or single tickets		

4.27.	Automatically create/send invoices/group sales contracts when necessary		
4.28.	Easily create and manage unlimited ticket price scales, ticket types, and service charges in house		
4.29.	Create an unlimited number of discounts, price categories, price levels and hold codes in house		
4.30.	Complimentary tickets can be set up as various types with caps built into the events and can be processed within the same order as regular tickets		
4.31.	Assign unlimited ticket reasons with all price types (i.e. Staff, Artist, Trade, etc. reason options when comp price type tickets are selected.)		
4.32.	Ability to set unlimited sales thresholds per event, including percentage of section sold, number of days prior to performance, etc.		
4.33.	Ability to report on sales thresholds		
4.34.	Automatic notification of sales thresholds reached		
4.35.	Layer one or more price changes on existing base price with scheduled start and end times		
4.36.	Allow layered price changes to be applied on some or all seats within a price section		
4.37.	Revenue from price change needs to be trackable and reportable		
4.38.	Support discounts, coupons and account credits and tracking of their use online or at the box office		
4.39.	Allow discounts to be applied or waived during an exchange or to a completed order		
4.40.	Allows add-ons for parking pass purchase, drinks at intermission, donations, merchandise, etc., tied to patron		
4.41.	Fees should be flexible in that varying types can be automatically applied based on various criteria		
4.42.	Allow multiple shipping methods with appropriate fees as needed		
4.43.	Create an unlimited number of facility, convenience, shipping, surcharges, and other taxes or fees in house		
4.44.	Ability to include different fees for different price levels or on a sliding scale		
4.45.	Option to purchase and waive ticket fees		

4.46.	Patron can add donation at time of sale without incurring a fee on donation		
4.47.	Misc. fees can be rolled into one, visible, total ticket charge (i.e., misc. fees are charged but not shown on screen or ticket)		
4.48.	Misc. fees can be booked to different G/L accounts (parking, tax, handling, etc.) and reportable by individual fee or aggregated		
4.49.	Ability to select and print tickets for multiple orders and/or multiple event for shipping or will call, with appropriate design formats		
4.50.	Print tickets from an individual order		
4.51.	Print multiple ticket designs in a single order or batch		
4.52.	Print tickets for multiple orders in a batch		
4.53.	Print receipts with transactions details, without printing tickets		
4.54.	Print and read bar codes on each ticket		
4.55.	Print a variety of ticket formats and sizes		
4.56.	Ability to customize and print tickets with standard graphic formats (Jpeg, TIFF, etc.)		
4.57.	Ability to create multiple ticket templates (tickets, headers, receipts, vouchers, etc.) and see how the information for a particular event will display on the ticket without printing it		
4.58.	Ability to customize multiple print-at-home ticket templates with rotating ads and venue specific information		
4.59.	Supports custom ticket design per event for all printing methods		
4.60.	At-home ticket printing for phone sales via follow-up email to patron		
4.61.	Ability to reprint tickets and track print history		
4.62.	Delivery methods are programmable so that availability for a delivery method can end automatically		
4.63.	Delivery methods can vary based on user or method of sale		
4.64.	Lists nearest venue entrance door on ticket printout		

4.65.	Sell/Create/track/manage credits (system credits, gift certificates, gift cards, etc.) allowing them to be applied and used with ease.		
4.66.	Produce credit or refund vouchers		
4.67.	Ability to create unlimited number of hold codes for a variety of reasons		
4.68.	Hold codes must be easily manageable on an event level		
4.69.	Ability to release tickets into a hold code at the order level		
4.70.	Ability to apply holds under sold seats		
4.71.	Option to expire hold codes automatically		
4.72.	Hold codes must be in their own category for reporting purposes and should not be counted as open availability or sold		
4.73.	Track a ticket’s history showing if the ticket has been printed multiple times, returned, resold, etc.		
4.74.	Tickets can be purchased and left for someone else's name for will-call		
4.75.	Provides access control to prevent duplicate ticket use		
4.76.	Scans barcodes for ticket validation in real-time		
5.	Flexible Ticket Sales System/Subscriptions/Memberships		
5.1.	Management of season ticket sales, renewals, renewal invoices, reminders, subscription upgrades and changes		
5.2.	Track ticket ownership and all transactions, including renewals, exchanges		
5.3.	Allows for unseated, paid subscriptions and single tickets		
5.4.	Link events together for sale as packages making sales or purchases for series subscriptions simple, intuitive and available online for self-purchase.		
5.5.	Subscriptions can span multiple venues and have the ability to select different seats for different shows if in the same venue.		
5.6.	Offers flexible ticket series or "package" creation including fixed subscriptions and create your own subscriptions		

5.7.	Able to renew a create your own subscription into a fixed subscription		
5.8.	Offers easy navigation of subscription seating charts or subscription composite seating map		
5.9.	Easily apply hold codes on subscription packages		
5.10.	Easily track new versus renewing subscribers for reporting purposes		
5.11.	Easily compare year over year subscription campaign data		
5.12.	Easily generate telemarketing lead data based on both subscription and single ticket history		
5.13.	Customizable membership programs that collect and track membership data and account histories, assign points or credits (for example), record personal notes, track donation history, etc.		
6.	Web Site/Web Sales		
6.1.	Ability to sell all products online		
6.2.	Supports common browsers and mobile applications		
6.3.	Provides mobile friendly viewing in a patron friendly format, "shopping cart" approach		
6.4.	System does not require login or collect user data if patron is "just visiting" online		
6.5.	Supports custom homepage design. Is a "white label" application - no vendor brand identity visible anywhere		
6.6.	Patrons can select "best seat available" when buying online		
6.7.	Patrons can pick their own seat from online seating diagram		
6.8.	Dynamically configure "best seat available"/"pick your own seat" options or the ability to turn off "pick your own seat" for large on sales		
6.9.	Seating charts show detailed information online when clients mouse over a seat		
6.10.	Seating charts should be able to be configurable as to whether or not single tickets may be created when reserving tickets online		
6.11.	Dynamically limit ticket quantities for large on sales		
6.12.	Supports adjustable cart time		

6.13.	Shows all charges itemized prior to Credit Card submission/ticket purchase with an order confirmation checkbox that is trackable/reportable (for chargeback/fraud prevention)		
6.14.	Supports at-home ticket printing for online sales		
6.15.	Lists seat location on at-home ticket printout		
6.16.	Provide real-time authorization and transactions for web sales		
6.17.	Able to sell and renew subscriptions and memberships online		
6.18.	Apply discount codes online		
6.19.	Access code/discount code protected advance purchase or fan club sale		
6.20.	Apply discount codes to selected seat locations		
6.21.	Support subscriber/member exclusive discounts		
6.22.	Support unique, non-transferable discount/access codes that can also be expired automatically		
6.23.	Provide web patrons with safe and secure transactions. Include proof in browser.		
6.24.	The ability to provide a seamless view to the buyer linking system to Theatre website		
6.25.	Capture email addresses and send confirmation e-mails		
6.26.	Patron has online access to own account to update profile and retrieve transaction history		
6.27.	Allow patrons to monitor purchases, memberships and subscriptions		
6.28.	Offers discount if purchasing membership at time of ticket purchase		
6.29.	Patrons can purchase and/or redeem gift certificates online		
6.30.	Supports bundling tickets and/or merchandise together in a seamless transaction		
6.31.	Compliant with Section 508 of the Rehabilitation Act of 1973		
6.30.	Compliant with Department of Justice ADA Revised Requirements section titled: Ticket Sales http://www.ada.gov/ticketing_2010.htm		
6.31.	Has 'forgot my password' functionality		

7.	Comprehensive and Customizable Report Capabilities		
7.1.	System must provide a comprehensive set of standard reports		
7.2.	Reports must be repeatable, accurate, auditable and follow sound accounting procedures		
7.3.	Standard reports should include, at a minimum, daily sales, period sales, event reports, seating, sales, accounts receivables, cashier reports, individual daily transactions by user account, patron reports/history, member and subscription reports		
7.4.	Show settlement reports should thoroughly summarize data in both simple and detailed ways, providing information on seats and revenue by type, location, price, payment method, etc.		
7.5.	Provide reports on a variety of queries (by event, by date, year to year comparisons, etc.)		
7.6.	Create fully customizable reports		
7.7.	Ability for information to be reported in a management dashboard		
7.8.	Ability for reports to be viewed/run on a mobile device		
7.9.	Ability to accurately track income amounts by type in relation to various ticket types sold for an event		
7.10.	Ability to break-down event sales revenue concisely in a report via cash, card present, card not present and online credit cards, subscription, checks, groups and other payment types		
7.11.	Interface with Excel for analysis of data		
7.12.	Produces scheduled, automatic reports delivered by email to any email address		
8.	Financial Systems		
8.1.	System must follow generally accepted accounting practices and be fully auditable		
8.2.	Deposit Theatre funds directly into Theatre bank account		
8.3.	Integrated real time credit card/debit card authorization system in local time zone		

8.4.	Address Verification or card verification for all transactions		
8.5.	PCI Compliant		
8.6.	EMV Compliant		
8.7.	Able to split individual event proceeds into multiple G/L accounts		
8.8.	Provides flexible G/L account naming conventions		
8.9.	All transactions and deposits can be audited daily via a printable report		
8.10.	Ability to integrate with account packages to transfer data		
9.	Marketing		
9.1.	Ability to manage and analyze patron interactions and data; compiling information across all points of contact with the patron including ticket sales, donations, direct mail, e-marketing and social media.		
9.2.	Provides interface with or contains an email service		
9.3.	Provides interface with or contains an internal survey feature		
9.4.	Provides scheduled, automatic pre-event notification		
9.5.	Provides scheduled, automatic post-event email thank you or survey		
9.6.	Ability to code patrons by affinity, interests, or donor status and able to search or select by codes		
9.7.	Extensive sales source identification capabilities		
9.8.	Compliant with bulk mail and postal regulations		
9.9.	Create mailing lists or email lists based on a variety of criteria		
9.10.	Create coupons and vouchers		
9.11.	Mail merge to word documents		
9.12.	Easy and natural integration with venue’s website for attractive event calendar listings and ticket sales opportunities		
9.13.	Ability to do A/B tests and track results		
10.	Security		
10.1.	Each staff member will have a unique login and password		
10.2.	Ability to set security levels to performances, discounts, holds, reporting, etc. at a user level		

10.3.	Easily assign various permissions to users: from a user being able to access only a single function to full access to all functions or any combination in between		
10.4.	Data encryption of online transactions		
10.5.	PCI Compliant, has certificate		
11.	Foundation/Donor Packages		
11.1.	Track contributions by contact and account level		
11.2.	Configure an unlimited number of campaigns, funds, donor levels and memberships		
11.3.	Process all types of contributions, including individual gifts, grants, corporate gifts, matching gifts and pledges		
11.4.	Allow reoccurring gifts on a variety of schedules, monthly, bi-weekly or annually		
11.5.	Record acknowledgement name preference		
11.6.	Easily create reports based on acknowledgment name and contribution amounts		
11.7.	Ability to track gifts for multiple funds/organizations		
11.8.	Easy to create and track acknowledgements/thank you' s automatically		
11.9.	Track donor acquisition, renewals and attrition		
12.	Installation & Programming		
12.1.	The City of La Mirada/La Mirada Theatre requires complete installation and programming of any proposed system to be fully included and defined within any proposal		
12.2.	Conversion process must be fully defined and outlined with any proposal		
13.	On-Going Technical Support, Software Updates, and Maintenance		
13.1.	Respondent has Pacific Time Zone support hours		
13.2.	Respondent provides live operator phone support		
13.3.	Online support - email		
13.4.	24/7/365 availability for support		
13.5.	Same-day response		
13.6.	Online support - live chat (accessible)		
13.7.	Fast response (< 1 hr.)		
13.8.	Respondent provides toll-free number for phone support		

14.	Event Management/Facility Management		
15.	Education Program Management		
Desired System Functions			

The following modules and/or functions are desired but not required of any Ticketing Management System proposed:

1.	Infrastructure		
1.1.	Provide enterprise license structure to Theatre such that annual licensing costs are paid annually and not based on number of transactions processed or per-ticket fees paid		
1.2.	Allows multiple organizations		
1.4.	Allows outside promoter/venue renter to access their own event info, sell tickets, run reports, answer calls		
2.	Ease of Use		
3.	Patron Database Management Criteria		
4.	Ticket Functionality		
4.1.	Mixed general admission and reserved seating offered at same event		
4.2.	Apply automatic dynamic pricing based on time threshold		
4.3.	Apply automatic dynamic pricing based on demand threshold		
4.4.	Print mailing labels for a batch of printed tickets		
4.5.	Creates passes for multi-day events		
4.6.	Creates passes for multi-events on same day		
4.7.	Support ticket sales via lottery - like Rent or Hamilton		
4.8.	Allow patrons to add themselves to a wait list online		
5.	Flexible Ticket Sales System/Subscriptions/Memberships		
6.	Web Site/Web Sales		

6.1.	Patron can see view from seat when choosing ticket		
6.2.	System prevents patron from picking seat(s) that would leave single seats open		
6.3.	System supports cart time counter		
6.4.	System supports Captcha technology		
6.5.	System is able to create unlimited number of unique patron access codes		
6.6.	User can self-exchange tickets		
7.	Comprehensive and Customizable Report Accounting Capabilities		
7.1.	Show the important performance indicators / performance measures like sales to date in an easily accessible, simple to view format like a home page dashboard		
7.2.	Provide data analysis tools to help interpret data future than standard reports provide to help identify, develop and otherwise create new strategic business opportunities		
8.	Financial Systems		
9.	Marketing		
9.1.	Easy and natural integration for on-sale events with social-networking sites		
10.	Security		
10.1.	Tickets can be sequentially numbered		
11.	Foundation/Donor Packages		
12.	Installation & Programming		
13.	On-Going Technical Support, Software Updates, and Maintenance		
14.	Event Management/Facility Management		
14.1.	Manage facility availability		
14.2.	Manage unlimited facilities		
14.3.	Shows facility availability online		
14.4.	Facility rental and fee structure displayed online. Able to submit a request to reserve a facility online		
14.5.	Reserve a facility online		

14.6.	Allows customers to see a variety of facility information online including photos, location information and layout. Please detail.		
14.7.	Set a capacity for a facility		
14.8.	Allows options to rent an entire facility and/or each individual room		
14.9.	Provides for various views for reviewing reservations and facility availability, including a calendar format		
14.10.	Allow appropriate security levels to be applied to calendars for updating and viewing.		
14.11.	Allow some calendars publicly available for viewing on the internet (e.g. those used by volunteers)		
14.12.	Prevents double bookings/conflicts?		
14.13.	Ability to inactivate facilities if they are no longer used		
14.14.	With appropriate security, allows a facility to be double booked		
14.15.	Allows 'holiday rules' be setup so a facility can't be booked on Christmas (for example) but provides an ability to override these rules		
14.16.	Allows reservations to be tentative/initial before they are final/firm. Explain how product can handle tentative reservations that need approval before becoming final.		
14.16.	Prepares estimates and contracts that include labor, venue rental, supplies and other resources		
14.17.	Tracks deposits, due dates and final billing		
14.18.	Allows fees to be easily adjusted and override the defaults		
14.19.	Applies discounts with different options. Discount can be applied to base fee and not to other fees or deposits or allows discounts to be applied across all fees		
14.20.	Tracks setup and cleanup times		
14.21.	Manage damage deposits		
14.22.	Reservation wait list		
14.23.	Allows only certain functions at a facility		
14.24.	Allows contracts be amended or cancelled		
14.25.	Allows recurring bookings		
14.26.	Tracks waivers		

14.27.	Standard reports within the system: Facility schedule Rental contracts Usage report by facility Schedule of all facilities a week/month/series of date with notes		
14.28.	Able to attach documents/contracts to a facility booking		
15.	Education Programs Management		
15.1.	Manages the following information for class registrants: In particular: - Names - Birthdate and alternative (i.e. 'Adult', 'Senior') - Addresses - Email Addresses and privacy flags - Phone Numbers - Courses Taken - Course Catalog - Facilities		
15.2.	Supports a variety of education programming including classes, day camps, workshops, seminars, and child care options		
15.3.	Supports an online Activity Guide course/activity descriptions to connect with online registration portal		
15.4.	Provides a web site for customers to self-register for courses or an option for online registration		
15.5.	Manages course eligibility (age by date, ability, etc.)		
15.6.	Allows courses to have a unique start date		
15.7.	Able to copy courses and/or seasons from one session to another		
15.8.	Displays a warning if a client adds a second class at the same time the client is already registered for another class		
15.9.	Allows courses to be prorated		
15.10.	Supports drop in programs		
15.11.	Allows a multi-child class discount option		
15.12.	Tracks the levels of courses taken		
15.13.	Allows customers create their own online account		
15.14.	Sends course receipts via email		
15.15.	Allows alerts to be set on accounts or courses		

15.16.	Ability for patrons to opt in for text messages		
15.17.	Customers can view their course history online		
15.18.	Courses can be displayed online but not be available for registration online		
15.19.	Register for courses using mobile devices		
15.21.	Has 'forgot my password' functionality		
15.22.	Allows the customer reprint a receipt online		
15.23.	Allows customers to fill out waivers or other instruction sheets from the site		
15.24.	Allows a single person to be part of multiple accounts. For example a child who is part of multiple households		
15.25.	Ability to email class receipts and/or special offers		
15.26.	Ability for clients to 'opt out' of receiving email.		
15.27.	Able to send email reminders by course		
15.28.	Able to look up current and past registrations or facility bookings for an individual		
15.29.	Able to look up the classes offered by a certain age online and by staff? In other words, all the classes we offer for a 3 year old.		
15.30.	Able to register one person in multiple classes at the same time, rather than registering into each class separately, for instance, in all 10 weeks of day camp		
15.31.	Ability to scan or easily track attendance electronically by course and/or location		
15.32.	Has tools to check youth in & out of programs, such as electronic sign in & out and/or photos of authorized pick up people		
15.33.	Tracks instructor pay rates in multiple formats, i.e. fixed fee, % of course fees, etc.		
15.34.	Supports a variety of payment options?		
15.35.	Provides a variety of scheduled payment plan options which can be attached to a payment type		
15.36.	Are there 'per transaction' fees for online registration? Office registration? Refunds? Other?		
15.37.	Ability to charge more for non-residents		
15.38.	Manages refunds		
15.39.	Able to manage scholarships, gift certificates or other discounts		

15.40.	Allows for incentive options and discounts (early bird registration/sibling discounts)		
15.41.	Able to prorate classes		
15.42.	Allows multiple fees associated with a course with the ability to report on each fee		
15.44.	Calculates class or facility cancellation fees automatically, and allows different fees for different classes		
15.45.	Able to prorate refunds available - for example can everyone in a class be refunded for 1 class session that is cancelled		
15.46.	Standard reports within the system Class Roster Registration Receipt Instructor Schedule Class List Class list by GL or supervisor by session Class list by registration date or participant age Course listing Waitlist Report by participant Schedule of all classes for a week/month/series of dates with notes Is there the ability to limit reports by various criteria		
15.47.	Allows staff to use email to communicate with patrons on course registration		
15.48.	Allows staff to use text messages to communicate with patrons on course registration		
15.49.	Tracks user message (email/text) preferences including tools to meet regulations around privacy and spam		
15.50.	Provides options for sending customer surveys, both manual and automatic		
15.51.	Provides a simple user interface for office users to program courses.		
15.52.	Able to do a lottery enrollment		

ATTACHMENT B
COSTS AND FEES

Initial Installation / Setup Costs (Non-recurring)

INSTALLATION / SETUP COSTS		One Time Costs
1.		\$
2.		\$
3.		\$
TOTAL COSTS FOR INITIALIZATION		\$
Notes:		

Annual Subscription Fees (Recurring)

SUBSCRIPTION COSTS		Recurring Fees (Indicate per month, year, or multi-year)
1.		\$
2.		\$
3.		\$
TOTAL COSTS FOR SUBSCRIPTION		\$
Notes:		

ATTACHMENT C
REFERENCES

Provide three (3) references of customers to whom your firm has provided similar services within the previous three (3) years.

Customer: _____
Contact: _____
Address: _____
Phone: _____
Type of Work: _____

Dates Delivered: _____

Customer: _____
Contact: _____
Address: _____
Phone: _____
Type of Work: _____

Dates Delivered: _____

Customer: _____
Contact: _____
Address: _____
Phone: _____
Type of Work: _____

Dates Delivered: _____