

# **A Guide to Writing a Request for Proposal**

How to let providers propose creative, relevant, and cost-effective solutions by focusing on the end, not the means.

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# **1. Structure of an RFP**

## **1.1. Key sections of an RFP**

You can easily identify the key sections you should include in your RFP by simply answering each and any of the following questions:

1. **Why?**  
Reasons why your organization need to buy a new solution.
2. **Who?**  
Description of your organization.
3. **What?**  
Nature of your project.
4. **How?**  
Contract.  
Information needed from suppliers.  
Proposal evaluation criteria.  
Contract award criteria.
5. **When?**  
Selection process timeframe and deadlines.  
Persons to contact.

## **1.2. Statement of Purpose**

Describe the extent of products and services your organization is looking for, as well as, the overall objectives of the contract.

## **1.3. Background Information**

Present a brief overview of your organization and its operations, using statistics, customer demographics, and psychographics. State your strengths and weaknesses honestly. Don't forget to include comprehensive information on the people who will handle future correspondence.

## **1.4. Scope of Work**

Enumerate the specific duties to be performed by the provider and the expected outcomes. Include a detailed listing of responsibilities, particularly when sub-contractors are involved.

## **1.5. Outcome and Performance Standards**

Specify the outcome targets, minimal performance standards expected from the contractor, and methods for monitoring performance and process for implementing corrective actions.

### **1.6. Deliverables**

Provide a list of all products, reports, and plans that will be delivered to your organization and propose a delivery schedule.

### **1.7. Term of Contract**

Specify length, start date and end date of the contract, and the options for renewal.

### **1.8. Payments, Incentives, and Penalties**

List all the terms of payment for adequate performance. Highlight the basis for incentives for superior performance and penalties for inadequate performance or lack of compliance.

### **1.9. Contractual Terms and Conditions**

Attach standard contracting forms, certifications, and assurances. You may include requirements specific to this particular contract.

### **1.10. Requirements for Proposal Preparation**

A consistent structure in terms of content, information, and documents types simplifies things for the people evaluating the proposals. Therefore, you should request a particular structure for the proposal and provide an exhaustive list of documents you want to receive.

### **1.11. Evaluation and Award Process**

Lay down the procedures and criteria used for evaluating proposals and for making the final contract award.

### **1.12. Process Schedule**

Clearly and concisely present the timeline for the steps leading to the final decision, such as the dates for submitting the letter of intent, sending questions, attending the pre-proposal conference, submitting the proposal, etc.

### **1.13. Points of contact for future correspondence**

Include a complete list of people to contact for information on the RFP, or with any other questions. Incorporate their name, title, responsibilities, and the various ways of contacting them into this list.

# **Ticketing Solutions Request for Proposal**

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## **Request for Proposal Summary**

Company:

System Platform:

Phone Room:

Resources:

Ticketing:

    Operations:

    Service:

    Ticket Office:

    Subscriptions:

    Groups:

    Web Sales:

Marketing:

    Email:

    Campaign Tracking:

    Gift Cards:

    Telesales:

    Promoters:

Development:

    Loge:

Finance:

Reporting:

CRM:

Cost of System:

Revenue potential (Year one):

## **1. Introduction**

## **2. Vendor Instructions**

### **2.1 Vendor Evaluation Process Overview**

### **2.2 Vendor Evaluation Criteria**

### **2.3 RFP Instructions**

To correctly respond to this RFP, vendors should prepare and return the following:

<b>Document</b>	<b>Medium</b>
1. Letter of Declaration (attached)	Hard copy sent by registered mail or traceable courier, with electronic format (Microsoft Word preferred) provided as backup if possible
2. Completed RFP	
3. Supporting materials i.e. Draft Contract	

All of these documents must be returned by March 2, 2007 in the format requested and to the address provided below. Playhouse Square Center will acknowledge receipt. If the vendor does not receive such a confirmation of receipt, it is the vendor's responsibility to follow up to ensure receipt by March 15, 2007.

### **2.4 Contact Information**

All questions regarding this RFP, the Vendor Evaluation process, or Playhouse Square Center in general should be directed to Brian Sayre, Assistant Director of Ticket Sales for Playhouse Square Center. Vendors are invited and encouraged to ask as many questions as necessary to reach a thorough understanding of any of the requirements of Playhouse Square Center's business.

*Contact by e-mail is preferred.*

Contact information is as follows:

### **2.5 Contract Negotiations**

### **2.6 Confidentiality**

Information disclosed to vendors and vendor employees by Playhouse Square Center will be considered confidential and proprietary when it: Pertains to Playhouse Square Center past, present, and future ticketing

## **3. Background**

activities, and/or is not readily available to the public.

### **3.1 Background**

### **3.2 Venue Layouts**

See attachments:

### 3.3 Ticket Sales:

## 4. Requirements

### 4.1 Ticketing

Please detail single, subscription and group seating ticket processes as they relate to:

1. Selling of tickets
2. Handling of payments
3. Renewal procedures
4. Exchanges (single & season)
5. Refunds
6. Purchaser accounts
7. Event setup & modification
  - a. Including
    - i. Seating manifests
    - ii. Ticket types
    - iii. Ticket layout
    - iv. Discounts
    - v. Promotion codes
    - vi. Lists
    - vii. Group Sales and Group Sales online
    - viii. Subscription packages, Pick plans, Flex plans, and renewals
    - ix. Subscription rollovers

In addition, please describe:

1. Reporting (in detail),
  - a. How it would work for
    - i. Secondary box offices
    - ii. Promoters
    - iii. Others
2. Software updates
  - a. Training provided
3. Bar-coding
4. Access control
  - a. Details of capabilities
  - b. Scanners (type of)
  - c. Reporting
5. Printing, reprinting, batch printing
6. Holds/held seats
7. Payments of:
  - a. Quick sales
  - b. Receivables
  - c. Online credits
  - d. Payment plans
8. Methods of ticket delivery
9. System's security
  - a. User security
  - b. Sales security
  - c. Online security
10. Describe the following in detail:



- a. Single, subscription and premium seating ticket processes, including, but not limited to online renewal procedures for season tickets, online account access, online ticket exchange program(s), prepaying concessions, purchasing group tickets online, printing of invoices, ticket auctions, and all secondary ticket market features.
11. Please also detail the engine that the system is built upon and the versions that are to be rolled out and when they will be rolled out.

#### 4.2 Marketing

#### 4.3 Distribution

#### 4.4 Hardware Requirements

### 5. Vendor Information and References

#### 5.1 Primary Contact Information

Please provide the following information for the vendor's primary contact with \_\_\_\_\_.  
This person should be prepared to answer or direct all inquiries that \_\_\_\_\_  
may have for the vendor.

Required Information	Response
Name:	
Title:	
Region (if applicable):	
Mailing Address:	
Telephone:	
Fax:	
E-mail Address:	
Management Personnel who would oversee _____ account (if different from above):	

#### 5.2 Company Background

Please provide the following information on your company history, organizational structure, and product strategy:

Required Information	Response
Company Name:	
Headquarters (Address):	
Branch Offices (City):	
Main Lines of Business:	
Length of Time in Business:	
Financial information (attach most recently audited financial statements of the firm & a statement regarding any recent or foreseeable acquisitions):	

### 5.3 Client References

Please provide three references from clients in the performing arts facility industry. All of these must be existing clients whose requirements are most similar to \_\_\_\_\_ current needs.

Data	Reference 1	Reference 2	Reference 3
Company Name:			
Industry:			
Number of Users:			
Number of Tickets Sold in Facility:			
Hardware/software Elements in Use; Number of Years in Use:			
Business Contact Name:			
Business Contact Title/Role:			
Business Contact Phone Number:			

## 5.4 Partnerships

Please describe any partnerships you have with companies who supply components of your system, including credit card processing, hardware or software providers, etc.

Partner	Nature of Relationship	Partner's Product Offering	Partner Contact Information

## 6. Cost and Revenue Projections

### 6.1 Professional Service Costs

Please estimate the cost of professional services typically required for implementation of services including process design, product configuration and product customization.

### 6.2 Estimated Hardware Costs

For hardware purchases, assume that \_\_\_\_\_ **does not** have any of the required equipment, with the exception of our own computers. Please estimate typical costs associated with purchasing the hardware required to implement your solution. \_\_\_\_\_ hardware requirements are listed in section 4.4

### 6.3 Training and Documentation Costs

Please estimate the cost associated with training end users and IT support staff as well as the cost of any product documentation and reference materials. Based on the end users listed in the hardware requirements (section 4.4), please outline the training program you would implement to facilitate a smooth transition (if applicable).

### 6.4 Support and Maintenance Costs

Please estimate all support and maintenance costs associated with maintaining the solution over the next five years. Please include any costs associated with network connectivity, hosting, updates, and similar types of costs. Be sure to include which services are included in the costs.

### 6.5 Other Applicable Costs

Please estimate any other costs associated with your solution that do not fall into any of the categories provided above, for example, labor costs, ticket stock printing, licensing fees, etc. Be sure to explain the reasons for these additional costs.

## 6.6 Assumptions

Please indicate any assumptions you made when estimating the cost. Explain any variable pricing structure.

## 6.7 Revenue Projections

## 6.8 Costs and Pricing Matrix

Internet  
Print at Home


# 7. Product Functionality

Please note that some of the following questions may have been answered previously in this document. If so, please note the page number in the response for reference.

No.	Question	Response
1	What platform is your ticketing solution on?	
2	What relevant products and/or modules to the ticketing system will provide solutions for _____?	
3	List the applicable hardware, operating system, and software applications your solution supports. Please list minimum system requirements.	
4	Outline the networking requirements of your system, including requirements for an access control system. Outline who would be responsible for installing any network components required.	
5	Describe your product's scalability for both hardware and software requirements.	
6	Does your application require any client software?	
7	Describe how credit cards would be processed by your system, including box office, outlets, Phone Room, and Internet sales.	
8	Describe your company's emergency backup plan for ticket sales and credit card processing, should your regular systems fail for any reason, especially on the day of an event.	
9	Do you support data conversion and customizations? Please explain, with a focus on importing _____ existing customer databases.	

10	Is the software package composed of modules, or is it marketed as one solution? If it is composed of modules, can it be broken up for purchase?	
11	Can the application generate e-mails using a CRM? Please describe this process in detail, including if the actual e-mail would be generated and sent by your solution.	
12	Can clients influence the future direction of the product? If so, how?	
13	How frequently are new software releases introduced?	
14	How do you notify clients when new releases are available?	
15	Please describe the upgrade process when moving to a new release of the software. How do you apply or distribute software fixes/patches?	
16	Please describe the reporting tools included with your solution. Also describe any outside reporting tools that can be used in conjunction with your product.	
17	Describe who is responsible for building events on your system (vendor or client), and/or the different parts of event building that each is responsible for.	
18	Does your system provide access control using bar-coding? Please describe your system.	
19	Does your system provide customers with the ability to print tickets at home? Can the box office produce tickets in the same way, and e-mail them if necessary?	
20	Please describe the reporting capabilities of your access control system.	
21	Identify if and how your system supports telephone sales, internet sales, and subscription sales.	
22	Describe how your system supports Subscription ticket sales such as pick-a-plan, flex books, and packages specifically for the performing arts.	
23	Provide information detailing phone room procedures and operations if applicable (location, number of operators, response time, and average length of call).	
24	Provide information on the number and location of outlets available to the ticket purchaser.	
25	Provide information on the data management capabilities of your system.	
26	Is your system capable of providing "customer-centric" data and reports, such as customer purchase history?	
27	Describe the types of training and education services you can provide.	
28	Does the ticketing system support gift cards and the integration?	

29	Does the ticketing system support customer loyalty points, tracking of, and reporting on loyalty points?	
30	Is the ticketing system integrated with Razors Edge and any Development software?	
31	Is the ticketing system integrated with MICROS point of sale system?	
32	Can the ticketing system support the sale of merchandise for added value purchases?	

## RFP Evaluation Centers

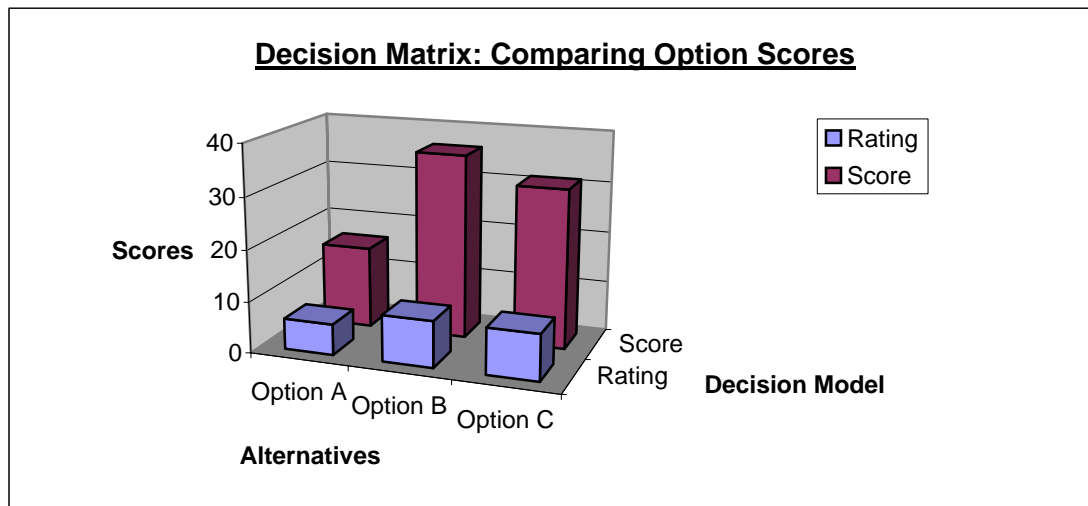
<http://www.rfp-templates.com/>

# Decision Matrix Example

A Decision Matrix template is provided on the other worksheet

		ALTERNATIVES					
Decision Model		Option A		Option B		Option C	
Criterion	Weight	Rating	Score	Rating	Score	Rating	Score
Criterion 1	2	4	8	2	4	4	8
Criterion 2	4	2	8	3	12	2	8
Criterion 3	5	0	0	4	20	3	15
Total	11	6	16	9	36	9	31

Score = Rating \* Weight



How to rate an option?

Rating	Description
0	No fit
1	Low fit
2	Fit
3	Good fit
4	Excellent fit



# The Contract Award Letter

The **contract award letter** is sent to the provider which solution, for the best value, fully satisfies or the best addresses the requirements defined in the request for proposal (RFP).

The contract award letter is presented on the next page.

It is highly recommended to read the recommendations below in order to properly and successfully use the contract award letter.

1. Use a formal letterhead and do not handwrite a contract award letter.
2. First, thank the person who submitted the proposal for the time, effort, and interest in the project related to the issued RFP.
3. Next, notify the provider that the submitted proposal is the best apparent solution to the project for which the RFP was issued. The award is not officially definitive since unsuccessful providers have the right to formally contest their disqualification, rejection, or non-selection within a reasonable timeframe, as initially defined in the RFP. Therefore, do not sign any contract with the selected provider until the deadline to receive protests expires and all protests are settled.
4. Finally, close the letter formally with "sincerely" or a similar polite expression. Sign your name and title.
5. Do not forget to send the contract award letter via certified mail.
6. Since things sometimes get a little more complicated than usual, remember to consult a lawyer for further information before doing anything.

[Location], [Date]

[Contact name]  
[Address of the company  
that submitted the proposal  
in response to the RFP]

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**Request for Proposal #[RFP identification number]**

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Dear [Contact name]:

I thank you for your time, effort and interest in our [Project title] project.  
Furthermore, I am pleased to announce that your proposal is the best apparent  
successful solution relative to our project.

Upon termination of the required protest period of [X] (X) business days after  
the closing date of [Closing date and time], I will be contacting you in order to  
execute a formal Professional Service Agreement (PSA).

Sincerely,

[Signature]

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[Name and title of the person responsible for handling disqualifications]  
[Address]

{LOGO}

Date

Name

Company

Address 1,Address 2

City, State Zipcode

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**Request for Proposal from ....**

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Dear **Name**:

I want to thank you for your time, effort, and interest in \_\_\_\_\_ and the future of our ticketing solution project.

Nevertheless, after reviewing the Request for proposal, and the financials we have to decline your proposal. All though \_\_\_\_\_ looks like a great system, we feel it is not a fit for \_\_\_\_\_.

Sincerely,

**Fiscal Year** \_\_\_\_\_

<i>Source</i>	<i>Paid</i>	<i>Comps</i>	<i>Amount</i>
Outlet			
Group			
Office			
Kiosks			
Phones			
IVR/Phone			
Development			
Remote			
Subscriptions			
Web			
Window			
	<b>0</b>	<b>0</b>	<b>\$0.00</b>

**Fiscal Year** \_\_\_\_\_

<i>Source</i>	<i>Paid</i>	<i>Comps</i>	<i>Amount</i>
Outlet			
Group			
Office			
Kiosks			
Phone			
IVR/Phone			
Development			
Remote			
Subscriptions			
Web			
Window			
	<b>0</b>	<b>0</b>	<b>\$0.00</b>