

REQUEST FOR PROPOSALS
FOLLY THEATER | Kansas City, Missouri

Notice is hereby given that the historic Folly Theater located in downtown Kansas City at 300 W 12th St Kansas City Missouri 64105 is requesting proposals from qualified services/agents for digital Ticketing Platform to replace current contract.

Proposals Deadline

Monday February 13, 2023
5:00pm CST

Proposal Submissions

To the Folly Theater business office in person or by mail

Folly Theater c/o Jennifer Smart
1020 Central St
Suite 200
Kansas City MO 64105

or by email to contact@follytheater.org

All timely proposals will be opened and acknowledged at 9:30 a.m. CST Tuesday February 14, 2023 at business office 1020 Central St. Suite 200 Kansas City MO 64105. All Proposals received that are time and date stamped later than 5:00 p.m. CST Monday February 13, 2023 will not be opened.

Information relating to the proposal specifications and procedure for submission should be addressed to Jennifer Smart, Ticketing and Administration manager by email to jennifer@follytheater.org or direct phone at 816-768-6881.

The Board of Directors and Folly Staff reserves the right to reject any or all proposals received, to waive informalities to evaluate the proposals submitted, and to accept the proposal that best serves the interests of Folly Theater.

The Folly Theater reserves the right to establish a short list of vendors who may be asked to provide a demonstration of its system and trial account if available. All expenses related to demonstrations are the responsibility of the offering company.

Upon completion of the proposal process, Folly Theater wishes to have partnership with vendor finalized with all training and technology implemented to the fullest no later than Thursday May 27, 2023.

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ABOUT

Opening in 1900, the Folly Theater is Kansas City’s oldest historic theater and premier performance venue housing an intimate lounge and a traditional theater with capacity to seat **1005 patrons**. With a rich history and recent renovations, the small but mighty staff of the theater are prepared to upgrade to a new software system to help sell tickets, subscription packages, and combine data and demographics alongside a database of donors and processing of contributions.

Currently the ticketing system and donor platform are separate entities and don’t integrate. It’s the intention to work alongside a platform partner that will help grow the userbase for a comprehensive customer experience making ticket purchases and donations easy and maintain a history and future of data. The Folly Theater programming includes a Jazz series including season ticket sales and renewals, Kids Series to educate local school groups on key curriculum, an Americana music series, and annual gala concert. Programming also includes outside rentals that have the option for Folly Theater to manage ticketing for their events or can arrange for their own ticketing (either third-party vendors, or internally). It is the goal that this upgrade in technology for a new system will better entice those vendors to allow Folly Theater to manage ticketing for those events, thus creating better historic data preservation.

The theater has had many changes in the past year, including the biggest renovation project in its history, upgrading technology in the hall and refreshing the space so it can be better prepared to last far into the future. Of these changes, is also new leadership of Executive Director, Rick Truman – who took up the mantle January 2022 with a fresh perspective and overarching goals for the theater and the team. Also new to the team in the role of Ticketing Manager as of June 2022 is Jennifer Smart who has over a decade working in various performance venues and ticketing technologies. This team has done their best to compile what historic data could be found in the following Sales History under Scope of Work in this document package, but the numbers may be shy of actual amounts given the nature of inheriting their respective positions.

1. SALES HISTORY

Fiscal Year (Fall-Spring)	# Events – Sold Through Folly Box Office	# Tickets Processed	Average Value	# Outside Rental Events	# Outside Tickets
2022-2023	52	9,177 (to date)	TBD	30	TBD
2021-2022	43	17,919	\$25.00	33	20,777
2020-2021					
2019-2020	29	17,623	\$20.85	36	20,420
2018-2019	41	27,181	\$26.91	46	22,575

2. RFP EVALUATION CRITERIA

- a. Ticketing services provider must demonstrate the suitability of product functionality based on requirements set within this document
- b. Ticketing services provider must have a history of and a future potential for reliable service and product performance with clients of similar size and scope to Folly Theater
- c. Ticketing services provider must show proof of ability to deliver the product and provide the necessary support for implementation and ongoing maintenance
- d. Ticketing services provider must allow for Folly Theater brand prominence throughout transaction and customer service flows

3. REQUIREMENTS FROM SERVICES PROVIDER

- a. Provide a proven solution that can meet the current and future needs of Folly Theater
- b. Improve customer data capture, analytic capabilities, and reporting
- c. Creation of various venues and mapping
 1. General admission seating
 2. Reserved seating
 3. Dynamic pricing capabilities
 4. VIP tiers & mapping locations
 5. Best-Available seat selection
 6. Select-Your-Own (SYO) interactive mapping
 7. Ability to create holds and kills in seating map
 - i. Opportunity to create timed-holds to expire at pre-determined period
 8. Pre-determination of wheelchair & companion seating
- d. Integrated CRM capabilities to track donations and donor activity along with ticket sales for an all-in-one platform for constituents
 1. Customer can add donation at point of sale (online/in-person/phone sales) without incurring a fee on donation
 2. Option for patron to add donation in pre-specified field online during check-out of ticket purchase
- e. Robust purchase/donation account management
 1. Maintain historical user data and accounts where customers can keep self-login information for online purchases
 2. Ability for staff to add additional notes to patron accounts for internal viewing
 3. Ability for staff to attach files to patron accounts for internal viewing
 4. Internal activity scheduling and reminders
 5. Opportunity for Box Office to return tickets in an order and have the paid amount remain as an on-account balance, usable toward future purchases or submitted
- f. Process and manage season ticket sales
 1. Processing payment in full
 2. Opportunity for payment plans charged on automatic basis
 3. Printing (hard/physical tickets and soft/digital delivery availability)
 4. Allow for upgrades on show-by-show basis
 5. Purchasing of additional tickets to show(s) at subscription discounted pricing
 6. Ability in system to exchange tickets to other performance in series (Box Office processing)
 7. Creation of flexible ticket series or “package” creation

g. Offer opportunities to sell tickets and process donations across multiple commerce touch points in one system

1. Real-time, live online web ticketing
2. Immediate, real-time updates on ticket status (in cart/sold/etc)

h. Sale & Processing of gift certificates

i. Discount creation

1. Percentage of base ticket
2. Specified dollar amount off base ticket
3. Opportunity to specify code activation for discount application
4. Ability to create ticket maximums for discount-code application (ex. Code for \$5 off 2 tickets, customer is purchasing 4 tickets in same order, but discount only applied on the 2 qualifying tickets)
5. Ability to determine pricing zones applicable for discount application
6. Ability to determine sections/seating applicable for discount application
7. Creation of specific discount-type for easy reporting (Student/Senior/etc)
8. Complimentary ticket processing by patron online utilizing predetermined code

j. Maintain a system that will be able to capitalize on new and emerging technologies to improve the customer experience and maximize revenue-generating capabilities from all sales channels

k. Live reporting with ticket scanners for real-time counts and status updates in purchase orders

1. Provides access control to prevent duplicate ticket use
2. Scans mag-stripe/barcode for ticket validation in real-time
3. Scans patron digital display (cellphone/tablet) barcode in real-time

l. Services provider with paperless (credit card entry) PCI compliant technology

m. Data, analytics, and reporting part of the integrated platform

1. Including automated ticket count forwarding to staff and promoters
2. Exhaustive sales reporting with breakdown of base ticket vs fees per show
3. Easily pull marketing data of ticket purchasers including name/phone/email/mailing address
4. Breakdown of purchaser demographics including gender/race/geographic location/income

n. Ticketing system provides ticket face design control

1. On soft/digital tickets
2. On hard/physical tickets

Desired Capabilities

- a. Provide a ticketing environment that will maximize ticket sales and ticket related revenue
- b. Ticketing services provider with extensive marketing programs & databases in feeder markets
- c. A ticketing services provider committed to technologies that will alert suspicious activity and thwart ticket scalping
- d. Integration with QuickBooks accounting system
- e. Option to create one-time complimentary code usage
- f. Billing & Invoicing features for contributions
- g. Opportunity to block out block of seating, able to be unlocked for sale on customer transaction using pre-specified code for a group or organization
- h. Abandoned cart marketing
- i. Internal mobile application for off-site processing
- j. Pay-What-You-Can Variable ticket pricing option for events (toggle on/off)
- k. Customer support/chat feature with customers/donors
- l. Fundraising goal settings
- m. Lead management – Converting donor prospects into potential donors
 - 1. Task management and Calendar integration

4. SERVICES PROVIDER OVERVIEW

Company profile

- a. Provide a company profile, including years in business and demonstrated financial stability
- b. Briefly describe your firm's organizational capabilities (staff, software, office location, etc)
- c. Briefly describe your firm's project management process
- d. Provide a description of any annual support contracts offered with the associated cost and (if applicable) respondent's hourly rate for support
 1. Fees shown should be all-inclusive, and shall include all labor, overhead, expenses, and estimated travel, subcontract, and administration costs
- e. Please describe your security measures that will be in place to prevent a hacking event and warranties that your company provides if security is compromised
- f. List of 5 client references in the sports and entertainment venue industry with similar requirements to those of Folly Theater. Include the following information
 1. Company name
 2. Industry
 3. Number of Users
 4. Average number of tickets sold in facility
 5. Hardware/software elements in use
 6. Business contact name, title/role & phone number and/or email address
- g. What is the company's philosophy regarding the primary brand experience, product development, and customer ownership.
 1. From a ticket buyer's prospective, is the brand experience with you or the venue
 2. Who establishes and monitors quality control criteria over the experience
 3. Who owns the data collected from customers
 4. Who has the right to use that data

Implementation Customer Details

- a. Total number of clients/accounts (on most recent software version)
- b. Indicate intention/timeline to migrate clients to most recent version
- c. Among your current clients, have you migrated a customer from a competitor's ticketing application to yours?
 1. If yes, what platform(s) did they migrated from?
 2. Did clients utilize prior ticketing contract/system while implementing transition
- d. How long does the changeover process take and what is the total down time

Key Differentiators

- a. Describe the key components that distinguish you from your competitors
- b. Describe how you would help maximize sales revenue through your systems, strategy, and marketing assistance
- c. Describe how you would utilizing your ticketing system(s) is a competitive advantage
- d. How are you thinking about next gen of ticketing applications & solution road mapping?
- e. Any other information deemed relevant and substantive in this decision-making process

Employee Training

- a. Describe in detail the training and installation process. Include as much detail as possible regarding all products and system(s). Include specific milestone dates and hurdles.
 1. Timetable for training
 2. Process for migrating customer & financial/monetary data to new system
 3. Description of Training materials available
 4. Training costs and locations
 5. Installation costs (software, hardware, data feeds, ticket printers, and maintenance)
 - i. Process of providing additional training sessions
 - ii. Ongoing training process associated with enhancements and system upgrades
 - iii. Any annual seminar or working conference in place for your customers

System Installation & Implementation

- a. Migration Project Management: Describe your migration project management process, including but not limited to:
 1. Project stages
 2. Quality control & Testing
 3. Proposed schedule
 4. Typical development costs

Product Support & Enhancement Requests:

- a. What are your guaranteed response times for problem resolution
- b. Describe your downtime/disaster recovery plan
- c. Telephone support
 1. Describe what is covered by phone support. (Customer Service, Tech Support, etc)
 2. What are the support hours and typical response type
 3. What support is offered for non-business hours and weekends
- d. Schedule for software releases containing bug fixes and product upgrades
 1. Assistance provided for installing and training on new releases
- e. How do you apply or distribute software fixes/patches

5. SYSTEM DETAILS

General System Information

a. Are all the following ticketing-related functions transacted on one system (types and channels)? If no, please indicate the primary sub system for each of the following functions:

1. Individual Ticket Sales – Web, Mobile, Phone, Retail & Box Office
2. Group Ticket Sales
3. Plan and Subscription Sales
4. Marketing
5. CRM & Donation Processing
6. Resale/Secondary Ticketing in accordance with the requirements of Missouri law
7. Corporate Sales & Ticketing services providers
8. Reporting

b. Provide a description of the ticketing-related system(s). Include general functional information (purpose), the year it was built, and other relevant information. If multiple sub systems are used, please indicate to what degree they are integrated. Include a chart or diagram detailing the integration scheme and indicate the level and frequency of data transfer.

1. When was your software developed
2. What release are you on
3. When is your next upgrade planned and what new features will be included
 - i. Will software upgrades require any downtime
 - ii. What features/enhancements are in the development for the next 1-3 years
 - iii. Describe the upgrade process when moving to a new release
 - iv. Does your application require any client software or 3rd party license
 - v. How many releases have you produced since product launch

c. Are your systems hosted? If so, describe your hosted model, including back up/recovery services

d. Please provide a detailed summary of hardware requirements and network securities required to operate your systems

e. Plans on replacing or significantly upgrading any of the systems in the next 1-3 years? If so, please provide a detailed description of upgrade plans, process, timelines, and functionality

f. Plans on adding additional commerce-related functionality in the next 1-3 years? Please provide a detailed description of plans, process, timelines, and functionality

g. Do you provide additional analytics services and/or consulting, such as lists, research reports, prospect modeling, feasibility studies?

Individual Event Ticket Sales

- a. How does your system handle individual event ticket sales in the following channels
 1. Internet (Chrome/Firefox/Safari) supported on Windows/MAC/Linux/Oasis
 2. Mobile Device (Phones/Tablets) supported on Android/iPhone
 - i. How well is system and capabilities optimized for mobile purchasing
 - ii. Is optimization applied to sales on mobile browser (through follytheater.org)
 3. Venue Box Office
 4. Mobile Application
- b. Are the following methods of payment available to customers
 1. Credit Card (American Express/Discover/Visa/Master Card)
 2. Check
 3. Cash
 4. Account Credit
 5. Gift Certificate (sold through system)
 6. Purchase Charge Cards (ex. Pre-paid Visa Gift Card)
- c. Are your system(s) capable of implementing a dynamic pricing model

Sales Channels

- a. System(s) capacity for selling tickets. If tested, how was the test conducted (live or controlled) and was the test independently verified? Describe any tour on-sales, provide artist name, event elements such as presales, and ability to handle purchase demands.
- b. How is purchaser information captured (including abandonment data). Your philosophy of how that data is shared, how it can be used, and who has rights to market to those customers
- c. Describe account-building tools in each channel. Can purchasers store personal information (e.g., credit card, mailing address, phone number, purchase history, upcoming events, etc) in a master account? Include how a customer can check their account/order status through various channels (phones, Internet)
- d. How does the system offer seating option(s) to a customer. Is the customer offered “best available,” (how is this determined – programmable by the client?) or are they able to select a particular section from a graphical map? How does the system deal with the sale of single tickets, i.e. split seat transactions?
- e. Can the system limit ticket availability by channel? For example, can an administrator program the system to only allow certain tickets to be sold at the box office?
- f. Does your distribution channels adhere to ADA regulations regarding fair access to inventory?
- g. Can customers use a “shopping cart” to purchase multiple events in a single transaction? If no, please elaborate on why this feature is not available and what future availability might be
- h. Describe what limits exist for online sales, such as number of tickets on hold in cart, hold times allowed and time out limits on purchases

- i. Describe how administrators can change service fees and other additional charges
- j. Describe up-sell capabilities through distribution channels, such as parking and merchandise
- k. Describe pre-sale and promotional code capabilities and if your system can support large scale event presales with unique promo codes for Artist fan clubs
- l. Describe any system(s) that will assist in corporate sales prospecting, inventory management, lead generation, or other corporate-sales related activities

Call Center

- a. Provide a description of your call center systems (if any) and capabilities for sales purposes
 - 1. Number of phone centers
 - 2. Number of agents available
 - 3. Hours/days of operation
 - 4. Philosophy on team operated call center with overflow capabilities to a central facility
 - 5. Outline any anticipated additional costs related to call center sales or operations

Secondary Ticketing & Fraud Capabilities

- a. Explain your commitment to honoring the requirements of Missouri's anti-scalping laws
- b. Describe anti-bot technology deployed through your distribution channels
- c. Describe fraud detectors or mechanisms you deploy

Ticketing Scanner Technology

- a. Describe technology for scanning ticketing barcodes and allowing entrance to events
 - 1. Does this differ from current industry practices of mass market scanners, if so – how
 - 2. Do scanners update in real-time to alert user of fraudulent/double-use tickets
- b. What devices are required for ticket scanning
 - 1. Are these devices proprietary through your services
 - i. What is the purchase/fee structure of these devices
 - ii. Would these be owned, rented through your services, or third-party purchase
 - iii. How are software updates and notifications of those updates shared
 - iv. What party is responsible for broken technology and repairs and any costs associated
 - 2. Are there any additional devices or technology upgrades needed to utilize the devices
- c. Can Box Office personnel view assigned barcode numbering in ticketing system
 - 1. Can Box Office override barcode numbering internally in ticketing system in the case of misprints to allow access to originally distributed barcode

Reporting

a. Describe any standard reports and/or reporting tools that are included in your ticketing system(s). Address, at a minimum, the following reporting functionality and provide examples of your reports

1. Real-time audit of an individual ticket
2. Real-time ticket usage (including counter holds)
3. Real-time game/event sales reporting and forecasting across all systems/channels
4. List generation from transactional engine (data export)
5. Attendance reports
6. Event audits
7. Historical sales and customer reports
8. Web based reporting
9. Contact/customer interaction reports
10. How can third-party reporting solutions be used in conjunction with your system(s)
11. Remote reporting capability (i.e. Promoters able to run numbers themselves)
12. Options for custom reporting

b. Describe the basic accounting features of your system(s), including:

1. Batch system reporting for daily balancing
2. Audit trails
3. Timed, automated invoicing for partial payments
4. Post-event reconciliation

Marketing

Please list and detail the assets that your Ticketing System provides to support marketing initiatives and sales campaigns. Including but not limited to:

- a. Distribution networks or ticketing services provider ships that increase the exposure of event information and purchase links
- b. Email databases or outbound newsletters which will include event listings
- c. Tracking and analytics tools which help to identify successful and unsuccessful campaigns via email and web/SEM
- d. Data segmentation tools and database features to improve targeting of both web and email campaigns
- e. Digital advertising programs such as retargeting
- f. Social media programs and integration
- g. Describe how your system enables ticket design to allow for custom information to be placed on the ticket face depending on the event

6. FINANCIAL DETAILS

Pricing

- a. Term/Length of agreement
- b. Pricing Structure that is associated with the ticketing system
 1. All-in static pricing
 2. Tiered product pricing
 3. Per-ticket processed pricing
- c. Access control technology and pricing for equipment
- d. Please provide any additional fees or charges

Value Added Services

- a. Describe in detail your philosophy about ticket/transaction fee structure. Provide a chart detailing examples of fees by product or transaction category, including all applicable royalties paid to client, or fees that may be charged to customers or client
- b. Provide a summary of how service charges, handling charges, processing charges, and other customer fees are determined in your proposed structure. Include the process by which fee structures are changed, approved, and the impact of those changes on any compensation due

Hardware

- a. Please provide a list of furnished or required hardware and any third-party software needed for operations
- b. Please provide details on training and support.
- c. Explain your intention and financial responsibility for training startup as well as ongoing training
- d. Please demonstrate support contracts, guaranteed response time, and methods of support (phone, email, chat)
- e. Vendor should provide unlimited support and fast responses to troubleshooting questions
- f. Web consultant shall update their software and hardware and release new components as new technology becomes available; provide demonstrated proof of keeping current with technology changes (software updates) and provide surveys to take client feedback
- g. Please describe additional hardware required and who is responsible for installing hardware

All questions and contact regarding the Scope of this Request for Proposals and proposal submission can be submitted to:

Folly Theater
c/o Jennifer Smart
1020 Central St., Suite 200
Kansas City MO 64105

Email: jennifer@follytheater.org

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Thank you!