



**NATIONAL MUSEUMS LIVERPOOL**

Ticketing Solution

**Author:** Ian Lindsay

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| Introduction |  |

## Company Background

National Museums Liverpool (NML) is one of the world’s leading museum organisations. NML currently comprises eight museums in and around Merseyside. Entry to all our venues is free, with circa 3 million visitors per year. We hold in trust and safeguard some of the world’s greatest museum collections, which are universal in their range – everything from archaeology and ethnology, natural and physical sciences, fine and decorative arts, maritime, social and industrial history. We are core-funded by central UK government, and we are the only national museum service in England based wholly outside London, so we have a unique fourfold role – we are the main museum service for Liverpool and Merseyside; the largest cultural organisation in the North West of England; and we operate at both national and international levels.

Having played a pivotal role in the cultural, educational and economic life of Liverpool and the North West for more than 150 years, our success can be measured in terms of how well we combine this local and regional role with our national and international responsibilities.

Our mission is to be the world’s leading example of an inclusive museum service. We believe in the concept of social justice; we are funded by the public and in return we strive to provide an excellent service to the whole of the public. We believe in the power of museums to change people’s lives. We work hard to be a free museum service and focus our venues, exhibitions and education resources to reach out, and to represent the diverse needs of our local communities.

National Museums and Galleries on Merseyside was established as a national museum as an incorporated Trustee Body by the Merseyside Museums and Galleries Order 1986, because of the outstanding quality of its collections. In 2003 the name was changed to National Museums Liverpool. Our origins go back to 1851 and the founding of Liverpool Museum. NML is an exempt charity by virtue of Schedule 3 to the Charities Act 2011.

NML has status as a Non Departmental Public Body (NDPB) sponsored by the Department for Culture, Media and Sport (DCMS). The DCMS became the principal regulator of NML on 1 June 2010 and provides the majority of its revenue funding.

## Project Background

NML have introduced entry fees for some special exhibitions in recent years partly due to reductions in public funding but also to enable a varied and engaging exhibition programme. NML ticket aspects of the museum and gallery offer across all sites using a variety of booking processes and would like to streamline the bookings of both charged and free entry exhibitions and events.

A key requirement is for the solution to deliver the ticket sales for the upcoming Terracotta Warriors exhibition. This is due to open in February 2018 through to October 2018. The exhibition is expected to deliver ticket numbers in excess of 500,000 and needs to support effective online, in venue and box office bookings with the facility to use third party agents to reach a wide audience. It is anticipated that the tickets will be sold internationally as well as in the UK so the solution needs to support this.

National Museums Liverpool has only recently started charging for exhibitions and therefore does not currently have the infrastructure to sell and market tickets on such a large scale. We have also never put on an exhibition likely to be in such high demand, so this is both a significant challenge and a massive opportunity for the organisation.

As a charity, everything we do is in support of our mission – to be the world’s leading inclusive museum service – and our values. While we need to raise income in some areas to support the delivery of this mission, we will not do this at the expense of our values.

## High Level Overview of Requirements

Bidders are asked to submit a formal tender for the “Supply and installation of a ticketing solution”.

NML is looking to acquire a ticketing solution to manage ticket sales and provide a CRM solution across the organisation through:-

* Allowing visitors to procure tickets to exhibitions, guided tours, etc. through on-line sales.
* Allowing NML to sell tickets for exhibitions, guided tours, etc. via our box office or in venue.
* Having intuitive core system reporting and analysis functionality.
* Accommodating a ‘self serve’ approach to building reports.

We need a solution that can manage the scale and importance of the Terracotta Warriors exhibition, allowing us to make the most of the exhibition in terms of short-term revenue and our long-term visitor base and brand. It needs to provide a website that is professional and easy to use, allowing us to capture maximum data from visitors.

From a CRM perspective the solution needs to enable NML to utilise the existing customer data it holds across several database solutions including Raisers Edge, Artifax and Priava. NML need to be able to gain significant insight of customer interaction to make effective real time decisions. Comprehensive dashboards and real time reporting is essential to enable effective decisions to be made. The reporting information needs to assist NML in management of visitor access and visitor flow through exhibition and events.

The customer journey for purchasing tickets, tours and other add-on’s needs to be quick and intuitive with minimal clicks and clear checkout process. There needs to be an effective security provision to reduce the risk of fraudulent transactions but also to comply with legal requirements such as PCI.

Clear ticket capacity for exhibitions, tours and events must be accessible for customers when purchasing online and for sales staff to advise and maximise ticket sales through the box office and in venue.

Clear financial reporting is essential to assist with our financial administration and legal compliance such as VAT and Gift Aid reporting.

Appropriate hardware to deliver the solution and meet NML requirements needs to be specified.

Ideally we would like a solution that has the capacity to deliver our events booking management requirements. Although this is not a firm requirement for the timescales discussed within this document.

## Existing Solution

Online exhibition ticket sales are currently provided by third party ticketing providers with in venue ticket sales processed through our existing Verteda Epos solution.

Membership and fundraising data is managed using Raisers Edge solution.

Corporate Events bookings are managed using Priava events software with corporate CRM database in this hosted solution.

Schools and group bookings are currently managed using Artifax solution.

Marketing databases are captured in Raisers Edge and are exported to use in Mail Chimp.

In venue Epos and inventory solution is provided by Verteda and is an Agilysys solution.

Due to multiple solutions, sales, reporting and CRM are not managed in a joined up way. The customer interaction with NML is therefore not followed from their initial pre-visit interaction through their actual visit or post-visit. We really need the solution to enable us to gain data on the full customer journey so that we can apply learnings to our future exhibition and event modelling more effectively.

|  |  |  |
| --- | --- | --- |
| |  |  | | --- | --- | | Tender Instructions |  |  Introduction |

# Tendering is required by NMLs procurement processes that ensure that NML is adhering to Managing Public Money guidelines. The Bidder is requested to propose a solution that will meet the current and future requirements of NML, as detailed within this tender pack.

## 2.2 General

NML reserves the right, without prior notice, to change, modify, or withdraw the basis of its request and/or to reject all proposals and terminate negotiations at any time. In no circumstance will NML incur any liability in respect of time, effort or costs incurred in regard to either discussions, meetings or time spent in respect of reviewing and/or responding to this document or any subsequent material.

This tender is not a purchase order or an offer to contract and does not constitute an offer capable of acceptance. This tender does not commit NML or any official of it to any specific course of action. The issue of this tender does not bind NML or any official of it to accept any proposal, in whole, or in part, whether it includes the lowest priced proposal, nor does it bind any officials of NML to provide any explanation or reason for its’ decision to accept or reject any proposal. Moreover, while it is the intention of NML to enter contract negotiations with the selected bidder, the fact that NML has given acceptance to a specific Bidder does not bind it or any official of it in any manner to the bidder. Acceptance of a proposal neither commitsNML to award a contract to any bidder, even if all requirements stated in this tender are satisfied, nor does it limitNML’s right to negotiate in their best interest. NML reserves the right to contract with a bidder for reasons other than the lowest price. Contract award will be post the tender process and may be awarded without discussions or negotiations

The bidder shall be deemed to have examined before the submission of their bid submission, all the provisions in this tender as well as regulations and other information relevant to your bid submission, and to have fully considered the risks, contingencies, and other circumstances, which could affect the bid submission. The bidder shall be responsible for obtaining all information by the making of reasonable and prudent inquiries and, by prior arrangement.

By submitting a bid submission the bidder represents that it has read and understood the tender. The bidder will consider the contents of any submitted bid submission as an offer to contract.

Any attempt by bidders or their advisors to influence the contract award process in any way may result in the bidder being disqualified. Specifically, bidders shall not directly or indirectly, at any time:

* Revise or amend the content of their tender in accordance with any agreement or arrangement with any other person, other than in good faith with a person who is a proposed partner or bidder;
* Enter into any agreement or arrangement with any other person as to the form or content of any other tender, or offer to pay any sum of money or valuable consideration to any person to effect changes to the form or content of any other tender;
* Enter into any agreement or arrangement with any other person that has the effect of prohibiting or excluding that person from submitting a tender;
* Canvass NML or any employees or agents of NML in relation to this procurement; or
* Attempt to obtain information from any of the employees or agents of NML or its advisors concerning another bidder or tender; or
* Offer, pay, promise to pay, or authorize the giving of any financial or other benefit to any person for the purpose of obtaining an improper advantage, or otherwise conduct themselves in a manner contrary to any anti-bribery or anti-money laundering legislation and/or regulations in the broadest sense (whether issued by the EU, the US, the UN or any other body) or any other such rule or legislation that may apply from time to time.

Bidders are responsible for ensuring that no conflicts of interest exist between the bidder and its advisors, and NML and its advisors and Partners.

NML also reserves the right to cease discussions with any bidder from the date of submission of bidder tender.

Failure to meet a qualification or requirement in this tender will not necessarily subject a proposal to disqualification but may do so.

## 2.3 Confidentiality and Non-Disclosure

The information contained in this tender (or accumulated through other written or verbal communication) is confidential. It is for proposal purposes only and is not to be disclosed or used for any other purpose.

Information received by NML in this tender will be held in strict confidence and will not be disclosed to any party, other than within NML and their engaged consultants if appropriate,without the express written consent of the bidder.

NML undertakes not to publicise any information obtained during this tender process, either generally or to any other bidders involved in the tender. Additionally, there will be no obligation on the part of NML to share any of the results or conclusions of the tender process with any bidder.

As a responder to this tender, you are reminded of the need for confidentiality and the need not to divulge your actual or intended tender price or an approximation of that price to any other person or body until we notify you that the contract has been awarded.

## 2.4 Accuracy of information and liability of NML

The information contained in this tender has been prepared by NML in good faith but does not purport to be comprehensive or to have been independently verified. NML does not accept any liability or responsibility for the adequacy, accuracy, or completeness of, or make any representation or warranty (express or implied) with respect to the information contained in the tender, or with respect to any written or oral information made or to be made available to any bidder or its professional advisors and any liability therefore is hereby expressly disclaimed.

Bidders considering entering into a contractual relationship with NML should make their own enquiries and investigations of NML's requirements. The subject matter of this tender shall only have contractual effect when it is contained in the express terms of an executed agreement.

Nothing in this tender is, or should be, relied upon as a promise or representation as to the future, and NML does not undertake to provide bidders with access to any additional information, or to update the information in this tender, or to correct any inaccuracies that may become apparent. NML reserves the right, without prior notice, to change the procedures outlined in this tender or to terminate discussions and the delivery of information at any time before entering into an agreement.

Should there be any obvious typographical errors or misunderstandings in the tender documentation then clarification should be sought. However, if the response is found to misrepresent facts, the documents will be deemed void. In the case where the error or misrepresentation is not discovered until after the contract is awarded, we reserve the right to determine the contract and costs incurred by us as a result of the determination shall be recoverable from the bidder under the contract.

## 2.5 Cost of Preparation

NML will not accept any liability or responsibility for any costs incurred by the bidder in preparing this tender document or any associated work effort.

## 2.6 Oral Agreement or Arrangements

Any alleged oral agreements or arrangements made by the bidder with any NML agent or employee will be disregarded in any proposal evaluation or associated award.

## 

## 2.7 Independent Price Determinations

The bidder shall warrant, represent, and certify that the following requirements have been met in connection with their proposal for this tender:

* The costs proposed have been arrived at independently, without consultation, communication, or agreement for the purpose of restricting competition as to any matter relating to such process with any other organisation or with any competitor;
* Unless otherwise required by law, the pricing proposed has not been knowingly disclosed by the bidder on a prior basis directly or indirectly to any other organisation or to any competitor; and no attempt has been made, or will be made, by the proposed to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition.

## 2.8 Payments Against a Contract Award

Under no circumstances shall the successful bidder begin to perform under the contract prior to the effective date of the contract. NML shall assume no liability for payment of services under the terms of the contract until the successful bidder is notified that the contract has been agreed by both parties.

## 2.9 Bidder Misrepresentation or Default

NML may reject the proposal and void any award resulting from this tender to a bidder who makes any material misrepresentation in their proposal or other submittal in connection with this tender.

## 2.10 Amendments to the Tender

NML reserves the right to issue amendments or modifications to this tender during the tender stage. These will be amended on the procurement portal where the tender was originally advertised and bids will be assumed to take account of any such modifications and amendments.

## 2.11 Responding to the Tender

In responding to this tender, the bidder you specifically agrees to the following:

Having examined all parts of the tender; that the supply of the Goods and/or Services to NML will be at the rates/prices as provided. All prices must be quoted on the basis indicated in the accompanying documents, except where the bidder proposes alternative priced procedures, and should **exclude VAT.** Discounts for prompt payment should be stated. The basis of the price shall be inclusive of all costs and delivery to NML.

That any contract whatsoever that may result from this tender shall be subject to the laws of England and Wales as interpreted in English Court.

The prices quoted and all other information supplied in this tender are valid and open to acceptance by NML for a period three calendar months from the tender return date specified in the tender

The essence of competitive tendering is that NML shall receive bona fide competitive tenders from all companies tendering. In recognition of this principle, any response is declared to be a bona fide tender, intended to be competitive and that the bidder (or representatives) have not fixed or adjusted the amount of the tender by or under or in accordance with any agreement or arrangement with any other person.

The bidder should declare that you have not done and undertake that you will not do any of the following acts:-

* communicate with a person, other than the person calling for this tender, the amount or approximate amount of the proposed tender.
* enter into any agreement or arrangement with any other person that he shall refrain from tendering or as to the amount of any tender to be submitted.
* offer to pay or give, or agree to pay or give, any sum of money or valuable consideration directly or indirectly to any person for doing or having done or causing or having caused to be done in relation to any other tender or proposed tender for the requirement any act or thing of the sort described above.

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| |  |  | | --- | --- | | Tender Timing, Scoring and Process |  | |

## 3.1 Questions and Additional Information

Formal queries concerning the content of this tender and the bidder’s submission should be submitted in writing by e-mail to Ian Lindsay ([Ian.Lindsay@liverpoolmuseums.org.uk](mailto:Ian.Lindsay@liverpoolmuseums.org.uk)) with the subject title “Ticketing Solution Tender”.

Where questions are raised by bidders and answers given clarify NMLs requirements for the tender, then these questions and answers may be shared with other bidders responding to this tender.

Queries must not be directed through any other employee, contractor or consultant who is engaged as part of the tender working party.

## 3.2 Target Timetable

The target timetable for this project is shown in the table below but bidders must be aware that whilst every effort will be made to meet these dates, the timetable may change for operational reasons

|  |  |  |
| --- | --- | --- |
| **Step** | **Task** | **Date** |
| 1. | Tender issued | **07/04/2017** |
| 3. | Deadline for clarification questions | **25/04/2017** |
| 4.. | Responses to clarification questions issued | **28/04/2017** |
| 5. | **Deadline for Bid Submission** | **05/05/2017** |
| 6 | Evaluation of the Tender Responses commences | **08/05/2017** |
| 7. | Clarification meetings if required | **16/05/2017** |
| 8. | Notification to unsuccessful Bidder | **17/05/2017** |
| 9. | Provisional notification to Successful Bidder | **19/05/2017** |
| 10. | Order Placed & contracts signed | **26/05/2017** |
| 11. | Installation complete | **14/08/2017** |

Note – all deadlines are at Noon on that business day.

## 3.3 Timing and Delivery

The bidder must provide a full submission by email. Bids should be in Microsoft Word, Excel or PDF format. The submission must include a copy of “Appendix A - Form of Tender”.

The submission must be made to [Tenders@liverpoolmuseums.org.uk](mailto:Tenders@liverpoolmuseums.org.uk). To ensure that your submission is successful you should ensure that each email is less than 8Mb. Emails should be titled “Ticketing Solution Tender”. If multiple emails are sent the header should indicate they are “Part x of xx”.

Bid submissions must be received no later than **Noon on 5th May 2017.** Any response received after this date and time may be discounted from further consideration. Any requirement that the bidder might have for proof of delivery is at the bidder’s discretion and cost.

No bid submission will be opened until the deadline of **Noon on 5th May 2017.**

To enable an efficient and fair evaluation process this process must be strictly adhered to. If a bidder does not comply with the requirements contained in this Section, NML may (in its sole discretion) disqualify the bidder from the competition.

**3.4 Bidder Interviews**

Following the deadline for bid submission, NML will evaluate and score each bidder’s submission against the evaluation criteria. Bidders may be invited to attend an interview to discuss the content of their written bid.

The post tender interviews will be held on 16/05/2017. Notification will be sent to those bidders invited to interview.

**3.5 Evaluation**

The bid submissions will be checked initially for compliance with this tender and for completeness. Responses that are not substantially complete and/or compliant may be rejected. During the evaluation period, NML reserves the right to call for further information from the bidders to assist in its consideration of their responses.

The bid submissions will be evaluated according to the following criteria, to determine the highest scoring responses. :

|  |  |
| --- | --- |
| **Element of Evaluation** | **Max Score Available** |
| Installation to Timescale | 5 |
| Fit for purpose and meeting all points on the Technical specification | 30 |
| References – evidence of supply and installation of a similar solution within the last 24 months | 5 |
| Total cost to NML over the 3 year contract | 30 |
| Additional Question 1 – Online sales | 10 |
| Additional Question 2 - Reporting | 5 |
| Additional Question 3 - Mobilisation | 5 |
| Additional Question 4 – In venue sales process | 5 |
| Additional Question 5 – Integration with existing solutions | 5 |
| **Total** | **100** |

Only information provided as a direct response to this tender will be evaluated. Information and detail which forms part of general company literature or promotional brochures etc. will not form part of the evaluation process. Supplementary documentation may be attached where you have been directed to do so. All sections must be answered unless advised otherwise.

|  |  |
| --- | --- |
| Bid Requirements |  |

## 4.1 Introduction

This section provides bidders with details of the form and content of bids that are invited and sets out the procedural requirements with which bidders must comply when submitting bids in order for their bids to be considered by NML. The process is intended to:

• assist NML in choosing the most economically advantageous bid;

• make clear the requirements with which bidders must comply and the basis on which the bids will be evaluated; and

• maintain competition throughout.

If a bidder does not comply with the requirements contained in this Section, NML may (in its sole discretion) disqualify the Bidder from the competition. Bids should be as concise as possible, whilst providing sufficient information to enable NML to evaluate bids in accordance with this tender.

The bidder is required to prepare the proposal and pricing based on the requirements specification detailed in section 5 of this document. Any assumptions that the bidder makes must be clearly stated in the appropriate section.

The costs must be fully itemised and transparent.

If the bidder has additional information that is directly relevant to the stated requirements but not explicitly requested, this may be added to the end of the most appropriate section under the heading “Additional Information” or referenced out to appendices.

Failure to return all of the requested documentation may result in your tender not being considered further.

This document details baseline requirements for the solution. This is not meant to be an exhaustive list of requirements but it will however serve to identify suitable solutions and bidders. NML reserves the right to modify its requirements at any time.

## 4.2 Management Summary

The bidder must provide a concise management summary of their offering, including the following:

1. A brief overview of the proposed solution including reference to any partners and third parties.
2. Reasons why NML should choose the proposed bidder and solution.
3. Summary of the bidder’s commercial offer.

## 4.3 Company Background

### 4.3.1 Company Details

The bidder must provide the following information:

1. The registered name and address of the company
2. Details of any holding companies
3. The date the company was established
4. The main activities of the company
5. The proportion of the total business accounted for by the proposed services
6. The number and location of offices, identifying the main functions of each
7. Insurance details (Professional Indemnity cover, Employers Liability cover, IPR cover)
8. Company accreditations (professional body accreditations and trade body accreditations but excluding awards)
9. Certifications and last audit dates, e.g. ISO9000 / 9001
10. An organisation chart that highlights those functions that would be involved in the delivery and subsequent support of the proposed services
11. The quality assurance mechanisms employed by the bidder
12. Describe any recent mergers or acquisitions
13. Detail any significant partnerships that will be used to deliver the proposed services. Detail the specific nature of each partnership and describe the commercial and contractual implications

### 4.3.2 Financial Information

The bidder must provide audited accounts for the last three financial years.

### 4.3.3 Third Party Services

The bidder must provide the following information for each of the proposed third parties / sub-contractors that may form part of the proposed solution to this tender:

1. Service
2. Supplying bidder name
3. Product name / version
4. List of relevant clients where the bidder has provided that service

### 4.3.4 Reference Clients

As part of the selection process NML will require to contact existing customers of the bidder for similar solutions. The bidder must select 2 reference clients and provide the following contact information:

1. Company name and address
2. Description of solution provided
3. Key contact name, title, and contact information
4. Length of the supply relationship

NML undertakes not to contact any reference company without arranging such contact via the bidder’s Account Manager first.

### 4.4 NML Procurement Policy

As part of the NML Procurement policy and procedures, NML expect suppliers to uphold similar business standards, particularly in relation to sustainability, ethics and the Modern Slavery Act.

* **Legal Requirements** - All relevant legal requirements, including UK and EU legislation, will be complied with in all procurement activities.
* **Sustainable Procurement -** Our sustainability objective is to ensure a continuous improvement in procurement decisions measured against delivering sustainable and ethical trading. More specifically, we seek to avoid adverse social and environmental impact in the supply-chain, the reduction of environmental impact from service operations and the purchase of products that meet recognised environmental standards.
* **Ethical Procurement -** Our ethical objective is to ensure that people in the supply-chain are treated with respect and have rights with regard to employment including the rights to freely choose employment, freedom of association, payment of a living wage, working hours that comply with national laws, equal opportunities, recognised employment relationship, freedom from intimidation and to a safe and healthy working environment.
* **Modern Slavery Act 2015** –we will comply with the modern slavery act. Modern slavery is a crime and a violation of fundamental human rights. It takes various forms, such as slavery, servitude, forced and compulsory labour and human trafficking, all of which have in common the deprivation of a person's liberty by another in order to exploit them for personal or commercial gain.

NML will require potential bidders to agree that they uphold similar values.

Please complete and return the NML Procurement Policy Supplier Agreement (Appendix C).

### 4.5 Timetable

Please note that the project must be completed by 14th Aug 2017.

Bidders should present a detailed timetable for planning, installation and completion for the project as a whole, indicating how this date will be achieved.

## 4.6 Contractual Considerations

The bidder must provide a copy of their standard Terms and Conditions for the proposed services.

**4.7 Costs**

A full breakdown of all costs is to be provided. One off costs and continuing running costs should be clearly distinguished. Please provide details of any potential extra costs.

If additional costs are associated with the Events Booking Management requirements, please separate these out from the Ticketing/CRM solution.

Cost breakdown should include the following as a minimum:

Please detail all associated costs as an appendix using the headers below.

**Project Delivery**

1. Project Management
2. Development
3. Deployment
4. Testing
5. User Training
6. System Training
7. Other (specify)
8. Integration costs
9. Report Configuration

**Application software, licences and support**

1. Account Management
2. Solution Licensing Requirements

#### Licence functionality including description

#### Type of licence – Named / Concurrent

#### One-off costs + annual costs per licence

1. Annual software support & maintenance costs for 3 & 5 year contract options
2. Annual support service costs for 3 & 5 year contract options
3. Hosting costs for 3 & 5 year contract options

**Rate card for bidder resources**

1. Project manager
2. Consultant
3. Installation engineer
4. Configuration engineer
5. Developer
6. User trainer
7. System trainer
8. Other (specify)

**Hardware costs of single set of equipment (detailed breakdown) for each scenario**

1. In venue sales
2. Box office sales
3. Pop up sales
4. Access control ticket scanning

As an exempt charity and an educational institution funded by government (DCMS). NML generally qualifies for academia, educational or charity pricing schemes offered by many bidders and manufacturers and this must be taken into account when tendering.

We would look for a phased payment schedule across the lifetime of the schedule, with minimal upfront payment. We would expect each phased payment to be invoiced with accompanying evidence of work completed and time spent.

**4.8 Summary of Documents to be returned as part of Submission**

Bidders are required to provide the following completed documents as part of their tender return, if a bidder fails to return the below items the tender submission will be considered invalid:

* + 1. Form of Tender
    2. Pricing document - Cost breakdown
    3. Management summary answers (section 4.2)
    4. All requirements referenced in point 4.3
    5. NML Procurement Policy Supplier Agreement
    6. Confirmation of Delivery dates/Programme
    7. Detailed specification of proposed solution
    8. Standard Terms & Conditions
    9. Answers to additional questions
    10. Responses to Appendix B – Requirements Detail
    11. Answers to all points raised in sections 5.2, 5.3, 5.4, 5.5, 5.6, 5.7 & 5.8

|  |  |
| --- | --- |
| Requirements Specification |  |

**5.1 Requirements Description**

NML requires the tender submission to detail a solution to our ticketing requirement. This solution should provide a fixed price solution for NML and should not include any further costs based upon the number of ticket sales.

A solution is required to meet the ticketing requirements as detailed in Appendix B. Additionally we would like the solution to have inbuilt CRM capabilities and preferably events management functionality.

NML will require any system to have a degree of flexibility and be adaptable in accordance with our changing environment and for any temporary exhibitions

This document details baseline requirements for the new system. This is not meant to be an exhaustive list of requirements but it will however serve to identify suitable solutions and bidders. NML reserves the right to modify its requirements at any time.

At present although we require a description of the solution for Events Booking Management, we will not be going ahead with this in the timescale described in the document. The implementation of the Events Booking Management will be a future phase. However we are looking to capture all information at this point.

**5.2 Detailed specification of requirements**

The new solution system will require access in line with the following:-

|  |  |
| --- | --- |
| **User** | **No.** |
| General Public – online sales | Unlimited |
| Box office sales users | 8 |
| In venue sales users | 10 concurrent users |
| Back office / Reporting, etc. | 5 concurrent users |

A comprehensive functional requirement is specified in Appendix B - Requirements Detail.

The bidder MUST indicate compliancy against each requirement. All non-compliant responses should describe the reason(s) why and how the bidder proposes to meet or partially meet the requirement.

Further information on how the proposed solution meets the requirement can be added in the Notes field.

Details of any licence charges which are applicable to be included in the tender submission.

## Technology Requirements

The premise of this subsection is to define the requirements of the Ticketing solution that are focussed purely at a technology basis:

1. The bidder must define the core hardware requirements and associated operating system requirements for the Ticketing solution.
2. The bidder must define the Ticketing solution software requirements, including licensing model and associated support & maintenance charges these are likely to create.
3. The bidder must confirm if the system provides a simple and effective data migration capability to enable the accurate import of data from NML’s existing Artifax and Raiser’s Edge applications to aid smooth transition of data.
4. The resulting Ticketing solution must provide a rich security access control environment to ensure that all users should only be provided with the appropriate access rights.
5. NML require the Ticketing solution to provide an audit of users’ activities such that this can be interrogated for auditing purposes. And additional benefit would be the ability to create automated alerts based on rules defined by NML that would identify inappropriate behaviours by the Ticketing solution user base.
6. System upgrades – the bidder must detail the process in which the overall environment is maintained to the appropriate release and patch levels. They must provide details of the process of approving Operating System patches within the proposed solution environment so that NML IT department can successfully and safely patch the environment without risking the underlying system functionality. The bidder must also provide details of the application patching strategy and how this should be implemented and supported by NML IT department.
7. The bidder must detail which virtualised environments the proposed solution has been tested and approved to function and is supported within – both from a server and desktop point of view. NML has a virtual server configuration, specifically Hyper-V, running Windows 2012 operating system. Thin clients are used on the desktop, running Remote desktop services.

## 

## 5.3 Service Desk/Support Requirements

The bidder must provide details on how they would provide application support based on the high-level requirements defined below.

1. Service Desk – can the bidder provide a suitably manned service desk to take incidents, service & change requests with the appropriate processes in place to resolve these as required? Please include opening hours and what capabilities the bidder has for out-of-hours support coverage.
2. Provide details on how the bidder will execute Incident & Problem Management, Change Management, Configuration Management and Service Level Management.
3. What service levels can the bidder offer for faults ranging from full system outage through to advice and guidance.
4. What service review and reporting can the bidder provide in relation to the support service provided for the resulting Ticketing solution?

## 

## 5.4 Security

Describe the steps the bidder will take to maintain the security of highly sensitive client information including personal information in accordance with Data Protection legislation. Due to the very nature of the work required to design, develop and deploy a ticketing solution such as this, the bidder will very likely be in the position of gaining access to extremely sensitive data held within NML’s core systems.

1. The bidder must precisely detail how they will ensure the data that they have access to will be protected from inappropriate usage by their employees.
2. The bidder must precisely detail the process involved for “desensitising” NML data should it be required to be taken off-site to aid the development process..
3. The bidder should submit a copy, or summary of their IS Security Policy for review by NML.
4. The bidder should submit details of their BCP/DR plans plus audit documentation from the most recent tests and a view of their BCP/DR testing schedules.
5. The bidder should submit a copy, or summary of their Physical Security Policy which should include details of their Access Control Systems.
6. The bidder must describe how audit trails and accountability will be maintained in particular in reference to changes made to NML’s Ticketing system maintained as part of the support agreement.
7. The bidder must confirm that NML may audit the bidder’s security compliance if and when required and with prior notice.
8. As part of the managed service support contract the bidder must commit to assisting NML with completing any ICT Security Audits when requested by potential or existing customers - these will be for questions that relate specifically to the scope of the support agreement.

## 5.5 Service Developments

1. Provide product roadmaps and any additional information regarding services or capabilities that may be of benefit to NML in the future.
2. Describe the process by which the bidder will proactively inform NML of potential enhancements to the services it provides.
3. Comment on any current or planned initiatives that will enhance the commercial offer.

**5.6 Implementation / Installation**

NML expects the implementation of the solution to be fully project managed, ensuring that the required delivery dates are met.

NML also expect the implementation to include the appropriate levels of on-site presence to ensure smooth delivery of key stages, specifically go-live.

**5.7 Support/Maintenance**

Details of the training provided as standard and optional training should be included.

Details of support provided to be included as optional extras in the tender submission.

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| Additional Questions |  |

**6.1 Introduction**

NML requires the tender to answer specific questions in relation to the submission.

Each question will be scored as per the evaluation summary in section 3.6.

## If you fail to provide a response to any applicable question, your bid may be deemed to be non-compliant. If a bid is deemed to be non-compliant, the bid may be rejected.

## Responses to questions should be limited to and focused on the specific requirement. Bidders should refrain from including generalised statements, information not relevant to the requirement and information relating to general marketing of your organisation. Each question answered must be complete in its own right and tailored towards that specific question.

Please expand each section of the answer table to include all relevant information.

|  |  |
| --- | --- |
| **Question 1** | Marks Assigned: 10 |
| Please explain how your solution will enable a successful intuitive online customer journey to maximise sales. Please include screenshots to show flexibility of online screen design and ease for customers to purchase tickets with minimal clicks. Please show examples of more than one implementation. | |
| **Answer:** | |

|  |  |
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| **Question 2** | Marks Assigned: 5 |
| Please fully detail the reporting capabilities, covering both standard and user generated reports. Provide examples of dashboards, key sales and analytic reports. | |
| **Answer:** | |

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| --- | --- |
| **Question 3** | Marks Assigned: 5 |
| Please fully detail how you will mobilise the solution in full, with a specific aim of us being able to commence ticket sales by mid August 2017. Provide details of your approach to working with NML, to understand the scope of the required solution, and overall ensure a successful launch.   1. Mobilisation – describe how you will select and appoint a mobilisation team with appropriate skills and knowledge to ensure the successful mobilisation of your proposed services. Describing the skill sets that these individuals will bring to ensure all aspects of the project are met in readiness for the service commencement date. 2. Management – describe the management structure that you will introduce in order to ensure an ongoing successful partnership with NML. 3. Communication – describe how you plan to communicate to all stakeholders ensuring that they receive consistent messaging and that communications are handled and issued in a manner appropriate to the service provided. | |
| **Answer:** | |

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| --- | --- |
| **Question 4** | Marks Assigned: 5 |
| Please give a full description of the process to transact tickets and merchandise sales in venue. Please note any differences re on day sales and advance sales. Please include screen shots. | |
| **Answer:** | |

|  |  |
| --- | --- |
| **Question 5** | Marks Assigned: 5 |
| From a CRM prospective, how would you integrate data from our existing databases (specifically Raiser’s edge and Priava) | |
| **Answer:** | |

**END**