

**Rice University
Events Management**

“Events Management Software Solution”

RFP# 2019-03-001

Date Submitted: March 1, 2019

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Purpose

The purpose of this Request for Proposals (RFP) is to solicit proposals from qualified sources to establish a contract through competitive negotiations to provide campus event management software for the Campus Events department of Rice University. The software will be used for managing the reservation of venues for campus events, delivering services associated with events, and for financial accounting of the events. The event management software should also provide robust review and approval workflow capability, reporting and query capability, and dashboard visibility to campus events.

Evaluation and Award Criteria

Responses to this RFP will be evaluated based on the proposer's ability to:

- Meet the minimum required functionality.
- Demonstrate robustness/redundancy of messaging infrastructure and high rates of message delivery.
- Provide additional capabilities deemed to be valuable to meeting the overall objectives of enhancing campus safety.
- Provide support and training services needed to ensure program success.
- Provide university client references specific to the product and services required.
- Demonstrate focus on higher education requirements.
- Overall price.

Background

Rice University is a private research university located on a 295-acre campus in Houston, Texas. The university enrolls 3,800+ undergraduate students, 2,800+ graduate students (~6,500 total student population), ~ 2,900 faculty and staff for a total campus population of ~10,000 (including campus visitors/contractors).

Proposal Preparation and Submission Guidelines

Proposals should be prepared simply and economically, providing a straightforward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis should be placed on completeness and clarity of content. Information which the proposer desires to present that does not fall within any of the requirements of the RFP should be inserted at the appropriate place or be attached at the end of the proposal and designated as additional material. Proposals that are not organized in this manner risk elimination from consideration if the evaluators are unable to find where the RFP requirements are specifically addressed.

All proposals should include these sections:

- General Requirements Overview
- Company Information
- Technical Information
- Event Management Requirements
- Implementation, Training and Support
- Pricing

As used in this RFP, the terms “must,” “shall,” “should” and “may” identify the criticality of requirements. “Must” and “shall” identify requirements whose absence will have a major negative impact on the suitability of the proposed solution. Items labeled as “should” or “may” are highly desirable, although their absence will not have a large impact and would be useful, but are not necessary. Depending on the overall response to the RFP, some individual “must” and “shall” items may not be fully satisfied, but it is the intent to satisfy most, if not all, “must” and “shall” requirements. The inability of a proposer to satisfy a “must” or “shall” requirement does not automatically remove that proposer from consideration; however, it may seriously affect the overall rating of the proposer’s proposal.

Timeline for selection and implementation process is as follows:

- 1) Issuance of RFP: March 1, 2019 by 5:00pm.
- 2) Notification of intent to respond or refuse shall be received on or before March 15, 2019 at 2:00PM. Notification of intent (or refusal) shall be sent via e-mail to Hollie Fulsom, Campus Events Manager, at Hollie.R.Fulsom@rice.edu and Charlita Marrs, Technology Procurement Manager at cam3@rice.edu.
- 3) Final questions shall be received in writing no later than March 19, 2019 at 2:00PM and will be accepted by e-mail to Hollie.R.Fulsom@rice.edu and cam3@rice.edu.
- 4) Clarification answers to be sent to all intending to propose by March 25, 2019.
- 5) Proposals should be sent via e-mail to Charlita Marrs, Technology Procurement Manager at cam3@rice.edu no later than April 5, 2019 at 2:00PM.
- 6) Finalists shall be announced: April 26, 2019
- 7) Follow-up meetings and demonstrations: TBD
- 8) Award notification to the successful Vendor: TBD

Statement of Needs

General Requirements Overview

Requirement	Response
Provide a high-level overview of the proposed solution.	

Company Information

Requirement	Response
Provide the primary point of contact and contact information for the proposer.	
Describe the proposer's form of business (<i>i.e.</i> , individual, sole proprietor, corporation, nonprofit corporation, partnership, limited liability company) and detail the name, mailing address and telephone number of the person the Institution should contact regarding the proposal.	
Provide the following as documentation of financial responsibility and stability: <ul style="list-style-type: none"> • A current written bank reference, in the form of a standard business letter, indicating that the proposer's business relationship with the financial institution is in positive standing. • Two current written, positive credit references, in the form of standard business letters, from vendors with which the proposer has done business or documentation of a positive credit rating determined by an accredited credit bureau within the last 6 months. • A copy of a valid certificate of insurance indicating liability insurance in the amount of at least \$30,000 in the aggregate. 	
Provide a statement of whether the proposer or any of the proposer's employees, agents, independent contractors or subcontractors have been convicted of, pled guilty to or pled <i>nolo contendere</i> to any felony, and if so, an explanation providing relevant details.	
Provide a brief, descriptive statement indicating the proposer's credentials to deliver the services sought under this RFP.	
Proposer must have provided similar services for a minimum of 5 years. Please describe.	
Indicate the proposer organization's number of employees and client base.	
Proposer must be able to warrant that they provide background checks on all employees and that only employees who have undergone background checks will have access to data.	

Proposer should support higher education clients. State current number of higher education clients. Provide any appropriate customer retention statistics over the last 5 years.	
Indicate the proposer's focus on the unique needs of higher education as a customer base in their development and services road map.	
Provide a narrative description of the proposed project team and its organizational structure.	
Provide customer references for three completed projects at institutions of similar size and mission currently serviced by the proposer. Each reference must include: <ul style="list-style-type: none"> • The institution name and business address. • The name, title and telephone number of the company contact knowledgeable about the project work. • A brief description of the service provided and the period of service. 	

Technical Information

Requirement	Response
Proposer's solution must be a hosted, Software-as-a-Service (SaaS) model. Please describe any on-site installation required or other deviations from a hosted, SaaS model.	
Proposer must demonstrate an adequate business continuity plan and should discuss the methods used to ensure redundancy. Specifically describe the hosting infrastructure and methods used to ensure redundancy.	
Proposer must provide security for individual data. Please describe your policies for ensuring data privacy and security.	
How can users be sure their information is secure and will not be used for any other purposes or sold to third parties?	
Proposer should describe their ongoing maintenance and system testing procedures. Include in this response information relative to how new features are addressed.	
Proposer should describe its data backup and recovery policies.	

Event Management Requirements

Requirement	Response
Event Approval Flow (Alcohol, Campus Events, Minors, Travel, High Risk Events) - ability to specify approval workflow parameters and decision branches.	
Risk Management Plan Review - ability for Risk Management Plan to be uploaded with review/approval workflow.	
Automated email notifications to approvers/reviewers for approval workflows.	
Accounting and financial management - ability to budget and track event revenue and expenses, ability to offer discount or surcharge.	
Ability to integrate with Banner, Oracle or Workday ERP for posting financial information.	
Ability to accept credit card payments (nice to have)	
Ability to integrate with course registration software (e.g. Banner, Destiny Solutions) to download/upload classroom and class schedule information	
Ability to integrate with Google Calendar and Outlook Calendar for adding and viewing scheduled events	
Ability to integrate with Campus Labs' Campus Engage for uploading event information	
Ability to integrate with campus-wide Advancement system for event attendee tracking	
Mobility - Mobile Viewing/Booking - ability to request an event via mobile device, ability to view event booking via mobile device	
Access for event planners to take registrations and check-in guests at events to track attendance	
Venue information - ability to provide photos, capacity, venue type	
Pre-loaded venue/space set-ups for users to select	
Registration authentication to ensure internal users are affiliated with the institution. Institution must have the ability to select from the following authentication methods to control access to the internal user registration portal: <ul style="list-style-type: none"> • Authentication native to the proposer's solution. • Integration with institution's LDAP server. • Integration with institution's CAS SSO. • Integration with institution's shibboleth SSO. 	
Security Controls and access for users that are venue specific - ability to customize a user's access including venue-specific access	
Stored records for comparison with previous years	
Reporting/Query Capabilities	

Ability to track equipment needs/inventory for spaces, track when requested items are delivered to the venue, track when delivered items are returned to inventory	
Automated email notifications for equipment and service needs	
On-demand space requests for specific venues	
Automated email response and status updates to requestor	
Separate forms and processes for internal vs. external requests	

Implementation, Training and Support

Requirement	Response
Describe any tools or services provided to maximize service adoption. Any additional costs should be clearly detailed in the pricing section below.	
Proposer's solution shall include initial training for system administrators and operators. Describe proposed training and detail any additional cost for future training in the pricing section below.	
Provide a brief description of the major steps in the implementation process, including university resource needs, any on premise activities required and timelines.	
Describe the support approach and, if applicable, levels.	
Describe any ongoing resource requirements expected from the institution.	

Pricing

Illustrate all financial elements in this section so that all costs (one-time, fixed, recurring, ongoing, optional, usage-based, etc.) for all services, hardware, software, licensing, hardware maintenance, software maintenance, development, documentation, training, support and operation are reflected. All pricing should be broken out by line-item category. The proposer shall also list and price any item that is part of the solution (whether hardware, software or management-related) that has not been specified in the requirements but is needed in order for successful installation, development and operation of this service.