



Pennsylvania Historical & Museum Commission

Ticketing, Event, and Membership Management System (TEMMS)

Request for Proposal (RFP)

Table of Contents

GENERAL INFORMATION	3
BID INFORMATION AND RESPONSES	3
DISCLAIMERS	3
BACKGROUND/STATEMENT OF NEED	3
INTRODUCTION	4
General.....	4
Scope of Services	5
Deliverables	5
Respondent Must:	5
TEMMS REQUIREMENTS	5
General POS Requirements	5
Pricing.....	6
Inventory Management	6
Employee Management.....	7
Security	7
Financial and Reporting Needs.....	7
Inventory Reports.....	8
Hardware.....	8
Offeror Must:	8
CURRENT EQUIPMENT INVENTORY	9

GENERAL INFORMATION

The Pennsylvania Historical and Museum Commission (PHMC) issues this Request for Proposal (RFP) to procure a comprehensive Software as a Service (SaaS) Ticketing, Event and Membership Management Systems (TEMMS) product that manages event/site admissions, ticketing, and reservations and provides information reporting.

BID INFORMATION AND RESPONSES

Potential suppliers are requested to submit an electronic bid no later than **2:00pm on Friday, June 2, 2023**.

RFP# 6100058010 is an electronic bid only and all responses must be submitted through Jaggaer system by **2:00 PM on Friday, June 2, 2023**. Any questions for this RFP must be submitted via the Jaggaer system only by **4:00 PM on Friday May 19, 2023**.

Responses should include the following as per requirements indicated for the RFP in 6100058010

1. Technical Submittal addressing the Requirements listed under “TEMMS Requirements”
2. Completed Cost Calculations for TEMMS pricing including, but not limited to (A) hardware, software, and any peripheral equipment. Please Note: PHMC has some related equipment (see the [Current Equipment Inventory](#) section of this RFP). We may choose to utilize this equipment and/or use the vendor’s equipment at our discretion. (B) Sample pricing lists for ancillary services that may be required in conjunction with the purchase of a TEMMS, including, but not limited to, installation, training, maintenance, and support.
3. Completed forms Iran Free Procurement Certification and Disclosure Form, Domestic Workforce Utilization Certification, Trade Secret/Confidential Proprietary Information Notice and Worker Protection and Investment Certification Form.

DISCLAIMERS

- ✓ PHMC is not liable for any costs or expenses incurred by respondents in the preparation of responses related to this RFP.
- ✓ Responses to this RFP will not be returned.
- ✓ Respondents will not be notified of the result of the review, nor will they be provided copies of it.
- ✓ Responses to this RFP will be public information and no claims of confidentiality will be honored.
- ✓ PHMC is not requesting and does not require, confidential or proprietary information or other competitively sensitive information to be included as part of the RFP submission.
- ✓ Ownership of all data, material, and documentation originated, prepared, and provided to PHMC during this RFP process will belong exclusively to PHMC.

BACKGROUND/STATEMENT OF NEED

There are 23 point-of-sale (POS) systems located and operating at 15 locations across the State. These sites collect admission and program sales as determined by the PHMC. Sales revenue is collected by both PHMC staff and volunteers with non-profit associate groups. These associate groups are 501 (c) 3 organizations that have entered into agreements with PHMC to assist in facilitating and coordinating operations and programs at some sites and depend on admission revenues to help with funding. In the calendar year 2022, the current POS/TEMMS system accommodated 71,998 transactions with a resulting revenue total of \$ 2,815,846.96.

The revenue collected at the sites is remitted to the PHMC, which distributes the proceeds based upon pre-determined percentages outlined under the revenue sharing agreements. As part of this process, PHMC ensures that revenue is accurately reported and deposited timely. All transactions must have a clear audit trail and follow Generally Accepted Accounting Principles.

INTRODUCTION

Pennsylvania Historic and Museum Commission (PHMC) is seeking a preferred provider of a Cloud-based or SaaS model Point-Of-Sales (POS) System. The proposed software (hereinafter referred to as “TEMMS”) and corresponding services that may commence as a result of this RFP, will utilize the latest standards, design, and technologies to provide PHMC with, at a minimum, the following:

General

- Cloud-based or SaaS model preferred.
- All solutions must be able to use Fiserv (FirstData)
- Ease of setup and use out of the box.
- Easy-to-use sign-off/on the process.
- Conduct regular transactions and accept multiple forms of payment.
- Safeguard customers' data with the latest in security technology including data tokenization and encryption.
- Compatibility with different merchant services.
- No credit card or customer information is stored on the devices or displayed on the receipt
- 24/7 Customer Service via phone and/or email
- Capability to export reports to an Excel spreadsheet
- PCI compatible Network fail-safe (keep entering cash sales information at the register while the network is down)
- Wi-Fi /IP mobile connectivity options
- Track inventory.
- Barcode system
- Provide powerful tools and advanced reporting capabilities for centralized and remote management of the POS system.
- Use industry standard, non-proprietary equipment, including PC or tablet
- Supports multiple-user networking.
- Provide user login IDs and passwords for users to uniquely authenticate themselves
- Provide different levels of user roles and access
- Have adequate security controls for user access
- Support and incorporate a mix of operational and financial data
- Provide robust reporting tools and features, including variance reports that offer real-time and historical data

The proposed software must be Cloud-based Point-Of-Sales System that can effectively provide the above-mentioned capabilities and services in a user-friendly and flexible manner for Authorized Users. This Request for Proposal (RFP) is considered an invitation to negotiate for the goods and services referenced herein. PHMC reserves the right to modify or waive the Terms and Conditions of the RFP and the description of the products and Services, and how they are to be provided, and to withdraw this RFP in part or its entirety.

Scope of Services

The proposed software must be a Cloud-based Point-Of-Sales System that can effectively provide the above-mentioned capabilities and services in a user-friendly and flexible manner for Authorized Users. This Request for Proposal (RFP) is considered an invitation to negotiate for the goods and services referenced herein. PHMC reserves the right to modify or waive the Terms and Conditions of the RFP and the description of the products and Services, and how they are to be provided, and to withdraw this RFP in part or its entirety.

Deliverables

PHMC has established the following list of deliverables that the consultant will be required to provide. PHMC reserves the right to modify the list of deliverables at any time before execution of the contract, to add, delete, or otherwise amend any deliverables, as it deems necessary, in its sole judgment, and in its best interest.

- A POS software system that satisfies all of the requirements listed in the RFP that is in place and operational.
- Training sessions.
- Training and Administrators documentation.
- PHMC reserves the right to add related services as needed.
- Unless otherwise expressly provided, the term of the Agreement shall begin upon its date of execution and, unless extended by PHMC or unless sooner canceled or terminated under the provisions of the Agreement, shall expire when deemed so by PHMC and all other Services have been satisfactorily performed and accepted by PHMC.

Respondent Must:

- Have experience in developing and operating Point-Of-Sales systems and have referenceable clients (within the U.S.) utilizing the proposed Software in a museum, gift shop, or entertainment environment for a minimum of one year.
- Be well-established and in a strong financial position
- Provide 24/7 hotline support
- This request for proposal (RFP) document is the property of PHMC. It contains certain information about the business of PHMC. It may not be altered, without the written express permission of PHMC.
- PHMC is to remain the sole and exclusive owner of all data entered into or generated by the proposed Software. Respondent shall not use any of said data in any form including, but not limited to, raw data, blended data, stripped data, aggregated data, and usage or statistical information derived from or in connection with the Data, except as it is necessary to fulfill its obligations to provide the proposed Software.

TEMMS REQUIREMENTS

General POS Requirements

1. Be a Software as a Service (SaaS) offering in a secure cloud computing environment.
2. Integrated credit card processing/authorization
3. Support Multiple Tenders (Cash, Visa, Discover, Money Order, Check, Store Credit, Gift Certificate, etc.)
4. Must be PCI Compliance
5. Use FirstData (FISERV) for payment processing
6. Have the ability to post to different GL codes when we tender a transaction
7. Allow user-definable tenders
8. Allow split tender capability on invoice
9. Search for merchandise by SKU
10. Search for merchandise/tickets/module/facility usage by model
11. Search for merchandise/tickets/events/module/facility usage by description
12. Display merchandise/tickets/events/module/facility usage available/stock level

13. Display serial numbers
14. Scan bar codes at the POS
15. Adjust and edit the number of items in the cart easily
16. Issue discounts and change prices by transaction line, or entire invoice, during cart tender
17. Issue discounts and change prices by a certain percent or dollar amount
18. Issue discounts by redemption items (coupons, rebates, etc.)
19. Track multiple promotions
20. Flag or display a message when a discount is below cost
21. Require management review when the price is below cost
22. Override automated discount (with appropriate user rights)
23. Specify salesperson
24. Issue a refund (partial and/or whole) at the POS either day of or on another day following current industry standards and being PCI compliant.
25. Print cash receipts with all transactions on one receipt
26. Customize receipts and invoices by adding a logo
27. User-definable keyboard shortcuts (Does not require mouse)
28. Allows sale void
29. Allows for web sales for admission, programs/classes/etc in a user-friendly fashion.
30. Allows a direct link for specific programs. (One button quick add to cart feature and guest check out)

Ticketing Needs

31. Accommodate multiple existing admission category options with the opportunity for expansion.
32. Be user-friendly/easy to use to accommodate various user ability levels.
33. Screen/User interface configuration should be easy to set up by PHMC staff with little or no from the vendor.
34. Allow PHMC to create tickets/events without vendor assistance.
35. Segregate individual sites for ticketing and reporting purposes so as not to accidentally sell tickets to or book facility use at another site.
36. Allow booking of pre-arranged group tours for schools, motor coaches, etc. including automated confirmation e-mails and check-in.
37. Provide tickets with time stamps.
38. Allow capture of customer demographic data, such as zip code, at the time of the transaction for useful reporting needs.
39. Allow for tickets to be purchased online with automatic e-mail confirmation.
40. Allow for group tours for schools, motor coaches, etc. to request reservations online with automatic email communication to the client.
41. Incorporate scanning technology to allow the scanning of pre-purchased tickets.

Pricing

42. Assign a different price level at the POS (Senior price, Veterans, children, school discount, etc)
43. Assign, calculate, and display sales tax based on predefined tax schedules
44. Create price tables/matrixes that allow multiple pricing levels
45. Assign price levels based on customer type, department, category, price range, or region
46. Allow mark down or discount merchandise with proper approval
47. Audit trail of mark down, discount, and any other price adjustments for reporting

Inventory Management

48. Store and view item number information
49. Store and view description information
50. Allow user-defined fields for each item
51. Store and view a barcode number
52. Assign and view a category for each ticket sales/event/reservation/facility rental and merchandise

53. Track ticket sales/events/reservations/facility rentals and merchandise by serial number if applicable
54. Allows multiple serial numbers per ticket sales/events/reservations/facility rentals and merchandise
55. Search for ticket sales/events/reservations/facility rentals and merchandise description
56. View the usage history for each ticket sale/event/reservation/facility rental and merchandise
57. Track offline inventory (ticket sales/events/reservations/facility rentals and merchandise not for sale)
58. Manual update of ticket sales/events/reservations/facility rentals and merchandise quantities with proper approval
59. Allocation of ticket sales/events/reservations/facility rentals and merchandise at the time of sales
60. Audit trail of inventory adjustments for reporting
61. Inventory reporting is to be exported to Microsoft Excel (CSV).

Employee Management

62. Record every transaction made by sales staff and supervisors
63. Generate employee log reports with an audit trail
64. Assign security levels to each employee

Security

65. Require management approval for the cashier to enter the opening and closing amount
66. Require management approval for a cashier to change the price at the POS
67. Allow ticket sales/events/reservations/facility rentals and merchandise costs to be displayed at the POS

Financial and Reporting Needs

68. Sales totals by specified time of day, week, month, or year
69. Sales totals for each department and category.
70. Cash drawer reconciliation report (Breakdown of revenue totals for each drawer and account for monies started in the cash register and monies for the next day)
71. Record and provide a daily, monthly, and annual accounting of individual transactions for all categories of admissions revenue and of the number of visitors for each site. Categories include general, special event, researcher, member, museum professionals, etc.
72. Satisfy Generally Accepted Accounting Principles (GAAP).
73. Provide a uniform ticketing and receipt process (please note: some sites have discontinued the use of tickets and use the receipt as the ticket.)
74. Have credit card chip reader capability.
75. At the time of sale, can either (1) process credit transactions coded to PHMC's credit card processor (i.e. First Data); or, (2) allow Associate Groups to process credit transactions through their external credit card processor.
76. Allow for flexible, ad-hoc reporting to include on-demand per-site reporting of daily visitors, user transactions, etc.
77. Provide the ability for the Bureau of Management Services (BMS)/accounting office to run reports and access the back of the house for all sites at will.
78. Daily sales transaction details by cashier
79. Number of items or admission tickets sold by the time of day, week, month, or year
80. Number of items or admission tickets sold for each module (groups, facility, planetarium, front of house, store)
81. Schedule of reserved pre-scheduled groups and facility-use events with details/notes from reservation
82. Income statement report to include monthly and annual financial reports by defined categories and visitation
83. Reporting to include on-demand per-site reporting of daily visitors, user transactions, etc. Allow all these mentioned above to be exported to Microsoft Excel (CSV).
84. Require an on-demand real-time report
85. Reporting to include on-demand per-site reporting of daily visitors, user transactions, etc.
86. Group income report

Information Technology, Security, and Compatibility Needs

87. Be a Software as a Service (SaaS) offering in a secure cloud computing environment.
88. All solutions must be able to use Fiserv (FirstData)(Non-negotiable)

89. Include role-based security to create different levels of access to the system. For example, provide the ability for anyone at each site with appropriate system roles/security clearance to make/approve reservations, view a schedule of programs (preferably a calendar screen that would show special events, scheduled groups, and staff assigned), and generate visit confirmation documentation.
90. Ensure customer data is secure and complies with applicable Payment Card Industry Data Security Standards (PCI DSS) set forth with Trustwave/First Data.
91. Provide for continuity of operations during an emergency including the ability to complete downtime sales and allow recovery of those sales.
92. Provide daily backup of all data files.
93. Provide disaster recovery procedures.
94. Provide fail-over capability so that if one part of the system or one site goes down, the other sites shall continue to operate.
95. Provide system auditing capabilities to ensure proper accountability of operations. For example, the ability to determine which user completed each transaction.
96. Allow export to Microsoft Excel (CSV).

Inventory Reports

97. On-hand inventory valuation reporting by item number, product line, category, and description.
98. Fast- and Slow-moving inventory report
99. Inventory transactions by item number, transaction type, category, or description
100. Inventory status by item number, SKU, and serial number
101. Serial number/SKU list
102. Inventory turnover

Facility Use and Membership/Donor Needs:

103. Allow online reservations, with a credit card, for facility rental and special events by the site.
104. Provide a centralized membership database accessible for ticket sales and to track member attendance behavior.

Hardware

105. Cash drawer controlled by the POS application
106. Mobile unit to be able to buy tickets on-site (Microsoft or Android)
107. A signature capture pad will be required for \$50 or over. E.g PAX machine
108. Touch screen monitor
109. Receipt printer
110. Bar code scanner
111. Membership card printer

Offeror Must:

1. Provide PHMC role-based employee/volunteer training. For example, there should be different levels of training based on user needs (e.g., administrator vs. general user).
2. Provide training for different end users, i.e. fiscal, customer service ticketing, and setting facility rentals.
3. Provide comprehensive user training documentation for different end users.
4. Complete initial installation, configuration, and support of a SaaS Admission/Ticketing system that meets the business and technical requirements at each of the selected BHSM sites, the State Museum of PA, and the Bureau office. This will be a phased rollout, starting in Harrisburg with the State Museum and in Ephrata with the Ephrata Cloister historic site.
5. Provide information regarding end user and technical support which is available to PHMC.

6. Provide information on the usual and customary Service Level Agreements (SLA) provided to customers.
7. Provide a product enhancement roadmap describing any planned enhancements to the software.

Preferred Capabilities (NOT required):

- Ability to accommodate retail sales at different sites
- Migration of existing PHMC POS data.

CURRENT EQUIPMENT INVENTORY

All sites currently have the following equipment:

- Computer (Hewlett Packard (HP) Prodesk 600, Dell Optiplex 760 Desktop or HP Probook)
- 17-inch Touch panel Monitor (USB)
- Epson TM88 Thermal Receipt Printer (USB)
- Mini Magtek Track 3 MSR Wedge Credit Card Reader (USB)

Some sites have the following equipment:

- Boca C (46) 2.0" 200dpi Horizontal Ticket Printer
- APG 4000 Cash Drawer (for use with Epson printers) with Insert and Locking Cover
- Metrologic MS9540 Handheld Bar Code Scanner w/stand (USB)
- Partner POS Display