



Corporation of the City of NEW WESTMINSTER

REQUEST FOR PROPOSAL

NWRFP-13-31

EVENT MANAGEMENT SOFTWARE – SUPPLY AND INSTALL

Closing Time:

Wednesday, September 4th, 2013
3:00 PM Pacific Standard Time (Vancouver BC)

Closing Location:

Main Reception Desk
City of New Westminster
511 Royal Avenue,
New Westminster, BC, V3L 1H9

Further requests for information :

Purchasing: Roy Moulder, SCMP

Purchasing Manager
Telephone: 604-527-4525
Facsimile: 604-527-4509
Email: rmoulder@newwestcity.ca

COMPANY NAME			
Address:			
(including Postal Code)			
Contact Name:			
Telephone number:			
Facsimile number:		Email:	
<u>Signature:</u> by officer with express authority to enter into contract		Dated	

CORPORATION OF THE CITY OF NEW WESTMINSTER

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1.0 INTRODUCTION

The City is seeking proposals from qualified vendors of event management software to supply and install a comprehensive event management software program that offers functionality in the areas of client relationship management, sales & marketing, finance, facility booking, and event management suitable for a new multi-use civic centre with scalability for multi-venue utilization.

2.0 KEY CONTENT

In addition to the substantive proposal requirements identified further on in this RFP, the following are considered key content that should be included as part of the proponent's proposal:

1. An overview of the company or firm including its experience and backgrounds;
2. A profile of the designated local representative(s);
3. Work plan approach and methodology to successfully accomplish this assignment;
4. The cost to complete the project with an explanation of basis of the fee proposal, including an anticipated level of effort detailing hours on the project;
5. An estimate of project related disbursements and the charge-out schedule for personnel and disbursements in general; the Proponent shall not add overhead costs to disbursements;
6. List five (5) or more references for whom you have provided similar services. Canadian and / or British Columbia based references are preferred.

3.0 PROPOSAL INSTRUCTIONS

One (1) electronic and three (3) hard copies of the Proposal are to be submitted and clearly marked on the outside envelope or box as follows:

Event Management Software – Supply and Install NWRFP-13-31

The City of New Westminster will receive Proposals at the location and time indicated on the title page of this Request for Proposal.

It is the Proponent's responsibility to ensure that the City receives its Proposal **prior** to the stated closing time. The City may nevertheless choose to consider late proposals. The City does not accept facsimile, electronic mail, or other unsealed submissions.

Requests for clarification or further information must be made in writing to the individual identified on the first page of this RFP. The City will respond to enquiries that it considers relevant to this RFP. The City intends to respond only to those written queries received at least ninety-six (96) hours prior to the closing Time. The City will record enquiries and post written responses on its website at [City of New Westminster | Bid Opportunities | Business | Request for Bids & Proposals - Open](#)

4.0 GENERAL

4.1 NO CONTRACTUAL OBLIGATIONS AS A RESULT OF RFP OR PROPOSAL

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This is a Request for Proposal, and not a call for tenders or request for binding offers. The City does not intend to enter into contractual relation as part of this RFP process and no contractual obligations whatsoever will arise between the City and any proponent who submits a proposal in response to this RFP until and unless the City and a proponent enter into a formal, written contract for the proponent to undertake this engagement.

4.2 OWNERSHIP OF PROPOSALS AND FREEDOM OF INFORMATION

All documents submitted to the City in response to this RFP or as part of any subsequent negotiation will become the property of the City, and will not be returned. Proponents should also be aware that the City is subject to the provisions of the *Freedom of Information and Protection of Privacy Act (FOIPPA)*. A proponent may stipulate in their proposal that portions of the proposal contain confidential information and are supplied to the City in confidence. However, under FOIPPA, the City may nevertheless be obligated to disclose all or part of a response pursuant to a request made under the Act, even if the proponent has stipulated that part of the proposal is supplied in confidence. The proponent should review section 21 and other provisions of FOIPPA in order to gain a better understanding of the City's disclosure responsibilities under the Act.

4.3 CONFIDENTIALITY OF CITY INFORMATION

This RFP and all information provided by the City to proponents is provided on a confidential basis, and proponents will not disclose any such information to any person (other than the proponent's legal advisers) without the City's prior written consent, nor may any proponent publicize or advertise its involvement with this RFP process or the City in connection therewith without the prior written consent of the City.

4.4 PROPONENT'S EXPENSES

For clarity, proponents will be solely responsible for their own expenses incurred in preparing a proposal or in any subsequent negotiations with the City.

4.5 CONTACTING CITY REPRESENTATIVES

Proponents shall not contact City elected officials, officers or employees directly or indirectly regarding this RFP, except as indicated in this RFP. If any proponent does contact any person, other than the authorized contact person regarding any matter in connection with this RFP, the City may, at its sole discretion, disqualify that proponent from participating in the RFP process and reject the proponent's response without further consideration.

4.6 CONFLICT OF INTEREST

By submitting a proposal, the proponent confirms that neither it nor any of its officers, directors, employees or proposed subcontractors, has any financial or personal relationship or affiliation with any City elected official, officer or employee or their immediate families which might in any way create or be perceived to create a conflict of interest.

4.7 LIVING WAGE POLICY

Effective January 1, 2011, the City of New Westminster became a "Living Wage Employer". As such, the City has established a Living Wage Policy that requires all firms that are contracted by the City to provide services on City premises, to pay their employees, who perform said service on City property, a Living Wage as calculated by the Living Wage for Families Campaign. The figure for 2013 for the Lower Mainland is \$19.62, assuming no benefits are provided by the employer.

In order to determine an employee's hourly rate with benefits the Living Wage for Families has created a Living Wage Calculator to assist with this determination. Please access the following website to determine your compatibility. <http://livingwageforfamilies.ca/calculator/>

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The City includes in all its competitive bid documents a Declaration referencing the City's expectations with regards to compliance of the Policy. (Attached as Appendix A) **Completion and submission of the Declaration is required prior to Contract award**

In evaluating submissions, the City intends to rely on the Declaration provided by a Respondent and shall have no obligation or duty to investigate the truthfulness of the Declaration. Please review the City's Living Wage Policy for further information.

http://www.newwestcity.ca/business/living_wage_employer.php

5.0 BACKGROUND

5.1 The Anvil Centre, a multi-use civic facility opening in 2014, is set to be one of New Westminster's most modern and state-of-the-art facilities with over 84,000 square feet of interior space.

5.2 Features include:

- a) Conference and meeting facilities with advanced technological infrastructure that can accommodate up to 500 persons for a seated event
- b) 350-seat non-proscenium theatre
- c) Multi-purpose art studios
- d) Contemporary art gallery
- e) Gift shop
- f) Museum & Archives
- g) Canadian Lacrosse Hall of Fame
- h) Tourism New Westminster Visitor Centre
- i) Restaurant and retail space

5.3 Currently the City does not have a software solution that can provide client relationship management as well as event management capabilities. To meet this need, the City is seeking the services of an event management software provider to supply and install a software solution that best meets the requirements identified in this RFP.

5.4 The business drivers for this project are:

- a) Positive return on investment, and
- b) Support the City's Intelligent City Goals

5.5 The benefits to achieve are:

- a) Maximum space usage and management of priority uses of the space,
- b) Exceptional customer service and client relationship management, and
- c) Efficiencies in event management processes ,communications, invoicing, contracting, supplier communications etc.

6.0 TERMS OF REFERENCE

6.1 **The following is a list of responsibilities of the proponent:**

- a) Demonstrate an extensive knowledge of event management and client relationship management implementations in a conference and multi-use facility setting,

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- b) Demonstrate the ability to customize solutions as required to meet restrictions or interface requirements with other City systems (notably JD Edwards v9.1 and Class v701) and software, and
- c) Meet or exceed all requirements for privacy and security according to the Freedom of Information and Privacy Act (FOIPP Act).

6.2 The following are requirements to be addressed by the software solution:

a) Event Management

- Book event spaces and manage use of / booking of multiple event spaces with different “options” i.e. first, second, third options based on priority functions and uses (with customized colour-coded statuses
- Manage event spaces and usage including capacities based on square footage, room set ups and audio-visual requirements
- Manage room rental fees
- Provide ability to place catering orders
- Generate event orders / work orders for various departments i.e. facilities, security, catering, audio-visual
- Generate proposals, letters and contracts tailored to client and event details,
- Budget management – track event budget
- Produce daily, weekly, monthly booking schedules
- Display daily, weekly, monthly and yearly calendar view with quick reference event names and times
- Show ability to prevent double bookings and room conflicts
- Utilize individual tabs for catering, audio-visual and set up materials i.e. tables, chairs
- Display conference space floor plans
- Confirm ability to produce to-do lists
- Manage building inventory i.e. tables, chairs, audio-visual equipment to ensure that more equipment is not committed than is available

b.) Financial

- Export directly to Excel for custom ad hoc reporting at the user level. Or print the custom report directly from the application
- Create partial payment invoices through payment plans or individually with the remainder automatically calculated
- Provide PCI compliant secure online payment capabilities Collections tools
- Accounts Receivable functionality allowing a user-friendly process for handling all accounts receivable transactions?

c.) Technology, Customer Support & Security

- Provide exceptional customer support services with tracking numbers / process for support issues (track progress for resolving issues)
- Ability to run on Windows 7 Software
- Identify capacity for concurrent users

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- Identify how maintenance or support calls are handled
- Identify fees associated with software upgrades or new releases. Identify frequency of new releases of the software
- Must have open data model so custom reports can be developed in house.
- Identify: installed or hosted, site license or user license, concurrent license or per person license
- Image tool for floor plans and creating setups with wide variety of event items such as staging, podiums, microphones, screens, projectors, tables, chairs etc.
- Illustrate that edit dictionary permits users with correct security to change terminology to match their business process
- Illustrate ability to place bad actor clients (clients with outstanding balances from previous events) on “holds” or “warns”
- Manage multiple quotes tied back to a single event
- Demonstrate provision for general information tracking in the system with a user defined field
 - Can reports be generated incorporating these fields?
 - Are standard fields configurable?
- Provide a dedicated contact / client care representative for inquiries
- Discounted registration for up to 3 attendees from the City for user Annual User Conferences
- Provide technical support (for resolve or technical issues or errors)
- Provide application support (for assistance with the use of the system and software configuration)
- Provide emergency support (system becomes unusable 24/7, 365) and scheduled meeting with dedicated contact at user conference
- Mobile Application – can all event management and client relationship management data accessible via a mobile app?

d.) Client Relationship Management / Sales

- Demonstrate ability to store client profiles, client / account information, contact information
- Provide capability to track client history i.e. capture event history in the account for a sales team i.e. food & beverage spend
- Provide capability to track communications (i.e. phone calls or one off emails) between sales team / event staff and clients i.e. date and time of action and type of communication i.e. proposal sent, contract sent, solicitation call made, what was discussed or decided
- Provide capability to track and report on Opportunities / Leads / New Business with ability to log tasks, actions and follow up, if required
- Track when a similar event took place, and provide details related to dates, times, move-ins and move-out
- Track completed tasks and identity by which team member
- Track what spaces have historically been contracted. Including data on rental rates, food & beverage, audio visual requirements and third party service

e.) Marketing

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- Provide ability to perform direct e-mail to client database
- Provide campaign tracking
- Generate mail/documents merges including built in wildcards compatible with Word
- Does the e-mail integrate to Outlook? Where are copies of that e-mail stored?
- Provide document management with integrated electronic document management for correspondence, CAD, pictures, video clips, spreadsheets etc. with version control
- Track market segment for marketing purposes

7.0 SCOPE OF WORK

7.1 The scope of work involves:

- a) Technical installation
- b) Customization and configuration of software to meet the City's requirements / needs i.e. build requirements templates, interfaces with other systems, reports etc.
- c) Training of staff / key personnel and provide training manuals
- d) Technical support during "go-live"
- e) Integrate software with current City systems as required
- f) Provide technical support and assistance on an ongoing basis

7.2 Schedule:

Task	Duration
RFP for implementation Services	August 13 th – September 4 th , 2013
Vendor selection	September 5 – September 12 th , 2013
Shortlisted proposal demonstration	September 23 rd – September 25 th , 2013
Trial version installed and tested	October 21 st -November 1 st , 2013
IT configuration, interfaces	November 4 th -22 nd , 2013
Business configuration and training	November 25 th , 2013-February 3 rd , 2014
Go-Live	February 2014

8.0 PRICING

8.1 A Proposal shall include all costs associated with the supply and implementation of an electronic agenda and meeting management software program. Fees and pricing shall be itemized as required on Appendix B. Proponents may prepare their own schedule in the event the sample provided in Appendix B does not provide sufficient space to include all costs

8.2 The Proposal is to include a schedule of effort and pricing based on hourly rates and separated into the following components:

- a) Technical install and configuration;
- b) Testing support;
- c) Implementation to production;
- d) User manual writing.

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- 8.3** The disbursements which will be reimbursed at cost will include the following:
a) Travel, accommodation, and meals if the successful Proponent is from outside the lower mainland. The City applies a per diem rate of \$80.00 for meals

9.0 INTERVIEWS / SOFTWARE DEMONSTRATIONS

- 9.1** The City may ask selected Proponent(s) to participate in one or more interviews / software demos.
- 9.2** Selected Proponents who are invited to participate in interviews/software demos will be further assessed on their interview/software demos.
- 9.3** The purpose of the stage is to:
a) Validate the information contained in the short-listed Proponent(s) response,
b) Assess the software being proposed,
c) Assess the team to be assigned to this Project, and
d) Ensure a clear understanding of the approach, effort, roles and responsibilities and timelines.
- 9.4** It is the City's expectation that the team to be assigned to the Project will attend any interview / software demo meeting.

10.0 PROPOSAL EVALUATION AND SELECTION

- 10.1** In considering and evaluating proposals, the City intends to identify the proposal (if any) that, in the City's opinion, offers the best value to the City.
- 10.2** The City is not obligated to accept the lowest or any Proposal, and may reject all submissions.
- 10.3** The City, at its discretion, may invite some or all Proponents for an interview to provide clarifications of their Proposals. In such event, the City will be entitled to consider the answers received in evaluating Proposals.
- 10.4** As part of the evaluation process, the City will require of the lead Proponent a no-cost, on-site software trial that if satisfactory will lead to an award and from the basis of a full install.
- 10.5** Proposals will be evaluated based on the following criteria:
a) Implementation Experience
b) Software Functionality
c) Experience of the local representative;
d) Fees / costs / etc;
e) Value added

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APPENDIX A – Living Wage Employer Declaration



DECLARATION – LIVING WAGE EMPLOYER

I, _____ as a duly authorized signing officer of

Company: _____

Address: _____

_____, confirm that all employees and sub-

contractors under our contract with the City as outlined below, are paid not less than the “Living Wage” as calculated by the Living Wage for Families Campaign.

I understand that this requirement extends only to those employees and sub-contractors’ employees that perform work while on City premises and property for durations in excess of one continuous hour per occasion.

I understand that the City will conduct audits if and when notification of breach of this compliance is received by the City. I understand that in the event any breach of this declaration is found to be true, the City reserves the right to cancel its contract without penalty at any time once said authentication of the breach is made.

Contract Name: _____

Authorized Signatory:

Dated:

CORPORATION OF THE CITY OF NEW WESTMINSTER**APPENDIX B – Pricing / Fee Sheet**

SYSTEM FEES	PRICING
Software (if there are charges for mobile software please itemize)	\$
Mobile Device software (if applicable)	\$
Annual License	\$
IMPLEMENTATION FEES	
Technical Configuration	\$
Functional Configuration	\$
Testing Support	\$
Implementation to Production	\$
OPTIONAL FEES	
Training Manual	\$
TOTAL PRE-TAX (EXCLUDING OPTIONAL ITEM)	\$
TAXES (EXCLUDING OPTIONAL)	\$