THE UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL

REQUEST FOR PROPOSALS (RFP) ADDENDUM

FAILURE TO RETURN THIS ADDENDUM IN ACCORDANCE WITH THE INSTRUCTIONS BELOW MAY SUBJECT YOUR PROPOSAL TO REJECTION

RFP Number: RFP040224KJM
Addendum Number: 01
Addendum Date: April 30, 2024
RFP Opening Date / Time: May 14, 2024, at 3:00 PM Eastern Time (ET)

Instructions: Return one properly executed copy of this addendum no later than the RFP Opening Date / Time specified above. This addendum may be included with your proposal, or it may be emailed separately to Kimberly Middleton at kimberly_middleton@unc.edu.

Please see the following University responses to all questions received by the deadline to submit written questions of April 16, 2024, at 3:00 PM ET:

1. Question: What is the anticipated annual ticket volume for Athletics and other University departments who may be using the ticketing solution? (Reference Section 3 of the RFP)

    Answer: Athletics is not part of this RFP. Solution must meet the needs of CPA.

2. Question: What is the number of single event tickets sold online? (Reference Section 3 of the RFP)

    Answer: 15,800 - Data is for FY24, which continues to have some post-pandemic impacts. CPA anticipates future seasons will have higher sales/increased volume.

3. Question: What is the number of single event tickets sold offline (via Point of Sale/Phone)? (Reference Section 3 of the RFP)

    Answer: 14,200 - Data is for FY24, which continues to have some post-pandemic impacts. CPA anticipates future seasons will have higher sales/increased volume.

4. Question: What is the number of multi-event packages sold online (not individual tickets within a package)? (Reference Section 3 of the RFP)

    Answer: The different types of packages sold were two (2). The volume of packages sold was about 25.

5. Question: What is the number of multi-event packages sold offline (not individual tickets within a package)? (Reference Section 3 of the RFP)

    Answer: The different types of packages sold were two (2). The volume of packages sold was about 25.

6. Question: What is the number of free single event tickets distributed? (Reference Section 3 of the RFP)

    Answer: 4,630 - Data is for FY24, which continues to have some post-pandemic impacts. CPA anticipates future seasons will have higher sales/increased volume.

7. Question: What is the number of free multi-event packages distributed? (Reference Section 3 of the RFP)

    Answer: N/A

8. Question: What is the number of free non-athletics event tickets distributed? (Reference Section 3 of the RFP)

Answer: 4,630 - Data is for FY24, which continues to have some post-pandemic impacts. CPA anticipates future seasons will have higher sales/increased volume.

9. Question: What is the annual revenue from online single event sales? (Reference Section 3 of the RFP)

    Answer: $682,000 - Data is for FY24, which continues to have some post-pandemic impacts. CPA anticipates future seasons will have higher sales/increased volume.

10. Question: What is the annual revenue from offline single event sales? (Reference Section 3 of the RFP)

    Answer: $460,000 - Data is for FY24, which continues to have some post-pandemic impacts. CPA anticipates future seasons will have higher sales/increased volume.

11. Question: What is the annual revenue from online multi-event package sale? (Reference Section 3 of the RFP)

    Answer: $4,500 - Data is for FY24, which continues to have some post-pandemic impacts. CPA anticipates future seasons will have higher sales/increased volume.

12. Question: What is the annual revenue from offline multi-event package sales? (Reference Section 3 of the RFP)

    Answer: $4,500 - Data is for FY24, which continues to have some post-pandemic impacts. CPA anticipates future seasons will have higher sales/increased volume.

13. Question: You mentioned that the vendor should submit information about their payment gateway and processor. Are there any restrictions that we should be aware of? Does the University or the State of North Carolina have preferred partners/payment providers? (Reference Section 3.5 of the RFP)

    Answer: TouchNet is the University's preferred gateway. Departments are encouraged to contract with TouchNet Ready Partners, develop landing pages internally, or use Event Registration.

14. Question: Our Solution utilizes a third-party platform, meaning all of our tools are hosted on the third party's infrastructure. Historically, we have submitted the third party's SOC2 and ISO certifications to organizations requiring them for security purposes. Is there any way to confirm that those documents will be adequate as part of this procurement process? (Reference Section 3.3 of the RFP)

    Answer: This will be determined by the University's Information Security Office at a later phase in the RFP process. For purposes of submitting your offer, please note that compliance documentation should not be submitted with your offer. If you are selected as an Intended Awardee, then we will request this documentation at the appropriate time. Please reference Section 3.4 (Business and Technical Requirements) of the RFP.

15. Question: Our response to the proposal will be a recommendation to continue services under a fully executed existing contract with the University. If selected, is the University open to amending an existing contract to comply with the contract term detailed in the RFP? (Reference Section 2.4 of the RFP)

    Answer: Due to the age of the existing contract, a new contract will need to be negotiated/executed – be sure to reference Section 7.3 (Vendor Exceptions; Additional Terms and Conditions) of the RFP.

16. Question: Is PlayMakers Repertory Company included in the scope of this RFP?

    Answer: PlayMakers is not part of this RFP. Solutions must meet the needs of CPA.

17. Question: Can you confirm the following dates for the Interviews, Oral Presentations, and/or Product Demonstrations: Thursday, June 13, 2024 - Tuesday, June 18, 2024, as they are over a weekend? (Reference Section 1 of the RFP)

    Answer: Yes, the dates are correct. We will be conducting Interviews, oral Presentations, and/or Product Demonstrations, Thursday, June 13, 2024 – Tuesday, June 18, 2024, during standard business hours (for clarity, Saturday and Sunday will not be eligible days).

18. Question: Are interviews, oral presentations, and/or product demonstrations intended to be held in person or virtually? (Reference Section 1 of the RFP)

    Answer: Currently, we anticipate demos in person.

19. Question: Can you clarify the definition of "source or sources of supply" as it relates to this RFP? (Reference Section 2.6 of the RFP)

    Answer: As used in Section 2.6 (Affiliates) of the RFP, "source or sources of supply" means a contract (or contracts, as applicable) under which the University and any of its affiliated UNC System institutions may purchase the ticketing and CRM solution specified in the RFP.

20. Question: Does this RFP look to include the affiliates listed as users under this agreement with the University and CPA in one software environment? (Reference Section 2.6 of the RFP)

    Answer: No, the Affiliates will not be included in the same software environment. However, any affiliated UNC System institution may leverage any contract(s) resulting from the RFP at their own risk and discretion.

21. Question: Does this RFP hope to establish a contractual agreement offer for all affiliates listed, which they can voluntarily enter into an agreement with the software provider based on the UNC pricing structure? (Reference Section 2.6 of the RFP)

    Answer: Yes. However, please note that the primary objective of the RFP is to identify a ticketing and CRM solution *for Carolina Performing Arts*. Secondarily, the University would like to make any resulting contract(s) available to any of its affiliated UNC System institutions.

22. Question: If an affiliate voluntarily enters into an agreement with the chosen software provider, can affiliate pricing be established during the BEST AND FINAL OFFER (BAFO) negotiations? (Reference Section 5.4 of the RFP)

    Answer: Generic Affiliate pricing may be presented in Vendor's offer. However, to be clear, the primary objective of the RFP is to identify a ticketing and CRM solution *for Carolina Performing Arts*.

23. Question: Can you please outline your concerns regarding the upcoming changes in your provider and why this concerns the University and Carolina Performing Arts? (Reference Section 2.8 of the RFP)

    Answer: Current provider was sourced 20 years ago. As part of good business practice, CPA is undergoing an RFP to solicit solutions to follow appropriate processes for competitive state procurement.

24. Question: Does UNCCH and the Carolina Performing Arts Center plan to include units beyond the ones mentioned in this RFP? If so, does each unit require its own branded e-commerce subdomain? (Reference Section 3.5.1 of the RFP– Options for Multiple Units)

    Answer: Should the solution allow the inclusion of other units who elect to use the solution, those units will require their own branded e-commerce subdomain.

25. Question: Can you elaborate on the two bullets points from the RFP? (Reference Section 3.5.1 of the RFP – Options for Multiple Units)
    - Multiple units have full system capability
    - Each unit maintains distinct branding and presence

    Answer: If the solution provides the option to include other units who elect to use the solution, each unit must have full system capability and have their own branding and presence for e-commerce. Reference response to Question Number 24 above.

26. Question: What is UNCCH Carolina Performing Arts estimated annual expense for this fiscal year? (Reference Section 4 of the RFP)

    Answer: Estimated annual expense for this fiscal year is approximately $7 - 7.5M.

27. Question: How many staff members require an individual login to the software, and what is the maximum number of users expected during busy hours?

    Answer: Approximately 60 total users require login access to the software and a maximum of 20 concurrent users expected during busy hours.

28. Question: How many Select Your Own Seat maps do you require?

    Answer: CPA has approximately 6 Select Your Own Seat maps at present but due to anticipated changes in our programming over the next few years, we expect to be operating in multiple new venues that may also require Select Your Own Seat maps, so we want the ability to add additional facilities when relevant.

29. Question: How many access control devices will be needed to scan tickets/member cards?

    Answer: 12 access control devices.

30. Question: What make and model are the current scanners related to the current software provider?

    Answer: Currently using Zebra 51s.

31. Question: Will you import or migrate any data sources to our software?

    Answer: Yes, we are currently working on a project to import/export data between our CRM and University Development's CRM.

32. Question: Does the University have a specific email vendor of choice? Can we bring one or recommend one? (Reference Section 3.5.1 of the RFP – Unified CRM)

    Answer: Currently, CPA uses WordFly, but vendors may recommend a different email vendor with a business case. Any vendor will need to comply with University standards for ITS security and risk assessment.

33. Question: Does ticketing simply mean the ability to sell a specific capacity and capacity management? Does it need to include specific seat selection capability? (Reference Section 3.5.1 of the RFP – Unified CRM)

    Answer: Ticketing must include specific seat selection capability.

34. Question: Do the converted donations need to push to another system for accounting purposes? If so, which system (name/vendor)? (Reference Section 3.5.1 of the RFP – Unified CRM)

Answer: Converted donations are not required to push to another system, but the system must allow the export of donation information data.

35. Question: Does reserved seating and general admission need to be for the same event? Or, are some events reserved and some events general admission? (Reference Section 3.5.1 of the RFP – Flexible Ticketing Solutions)

    Answer: Events are typically reserved or general admissions. In the future, CPA may want to have events that allow both reserved and general admission for the same event.

36. Question: What does "manage" mean? Does it need to integrate with a calendar? Do we need to select from a related list? (Reference Section 3.5.1 of the RFP – Event Control)

    Answer: CPA requires the ability to change the layout, price distribution, change ADA seating locations, put seats on hold/designate seats held back from general sales, and other similar functions. CPA employees must control these functions in house (not require vendor to make changes).

37. Question: Our solution offers QR code. Is RFID required? (Reference Section 3.5.1 of the RFP – Event Control)

    Answer: QR code is sufficient.

38. Question: Our solution has a storefront and checkout in events. What is needed from the eCommerce perspective? (Reference Section 3.5.1 of the RFP – Ticet Sales and Payment Collection)

    Answer: CPA requires a store front, ability to add donations, customer account management, checkout, and backend administration that feeds and controls to the storefront

39. Question: What other systems does the solution need to integrate with besides Salesforce, Blackbaud and Wordfly? (Reference Section 3.5.1 of the RFP – Integration)

    Answer: Currently, these are the only systems that CPA integrates with.

40. Question: Does the University have an existing ETL/middleware tool used for integration between systems? (Reference Section 3.5.1 of the RFP – Integration)

    Answer: No, CPA is not currently using middleware tool for integration.

41. Question: What is the purpose of data integrated from other systems into Salesforce? Is it read only or will the data be updated in Salesforce? (Reference Section 3.5.1 of the RFP – Integration)

    Answer: Data exported to or integrated with other systems is currently read only.

42. Question: If data is updated in Salesforce, will it need to be synced back to the original source? (Reference Section 3.5.1 of the RFP – Integration)

    Answer: CPA does not currently use Salesforce. The data does not currently need to be synced back to the original source.

43. Question: What options are needed for Online Ticket Exchanges? Payment refund? Apply to another event? (Reference Section 3.5.1 of the RFP – Ticketing)

    Answer: CPA is interested in all options that are available from the vendor.

44. Question: What options are needed for virtual events? Is there a particular platform envisioned for hosting virtual events, e.g. Zoom, GoToMeeting? (Reference Section 3.5.1 of the RFP – Ticketing)

Answer: CPA may present virtual events as a webinar or present live or recorded performances. CPA is interested in all options that are available from the vendor.

45. Question: Is near-field communication using Stripe acceptable? (Reference Section 3.5.1 of the RFP – Payment Methods)

    Answer: No, Stripe is not an approved software.

46. Question: Does the University have a preferred payment gateway? Is Stripe acceptable? (Reference Section 3.5.1 of the RFP – Payment Methods)

    Answer: The University's preferred payment gateway is TouchNet. Reference response to Question Number 45 above.

47. Question: What emailing system is being utilized by the University? (Reference Section 3.5.1 of the RFP – Customer Service and Membership Program Management Capability)

    Answer: Reference response to Question Number 32 above.

48. Question: Is the University seeking a full PoS (Point of Sale) solution? (Reference Section 3.5.1 of the RFP – Retail Merchandise Capability)

    Answer: No, CPA is not seeking a full Point of Sale solution in this RFP.

49. Question: What specifically is needed for hosting and ticketing? Our solution supports virtual events but is not a virtual conference platform like Zoom or GoToMeeting? (Reference Section 3.5.1 of the RFP – Manage Virtual Programming and Experiences)

    Answer: CPA may present virtual events as a webinar or present live or recorded performances. CPA is interested in all options that are available from the vendor.

50. Question: Does the University need to limit how many people can join a virtual event at a single time? (Reference Section 3.5.1 of the RFP – Manage Virtual Programing and Experiences)

    Answer: CPA is interested in what the vendor's options are for limited or opening virtual events.

51. Question: What is the maximum number of tiers required for virtual events? (Reference Section 3.5.1 of the RFP – Manage Virtual Programing and Experiences)

    Answer: CPA is interested in what the vendor's options are for limited or opening virtual events

52. Question: Will you need data migration / data uploading included in the proposal or will you be handling the data migration internally via uploads? If yes, can you describe the data and volume of data?

    Answer: CPA would like the solution to include data migration in the proposal. The data includes about 200,000 constituents and 20 years of performance and event activity.

53. Question: What are some challenges unique to the University that you think proposing vendors should be aware of as they compose their responses?

    Answer: Some challenges unique to the University that proposing vendors should be aware of would be the University's Security Requirements and Business and Technical Requirements – reference Section 3.3 and Section 3.4 of the RFP.

54. Question: Do you have a desired go-live date for the launch of the new solution?

    Answer: Preferred go-live date would be January 2025, but CPA is seeking the best solution and implementation for our operation.

55. Question: Are you willing to contract with multiple vendors who have no ability to subcontract to one another? In other words, there is no one vendor that can act as a prime vendor and subcontract to other third-party vendor.

    Answer: Please reference Section 2.5 (Contract Type) of the RFP and Section 7 (Subcontracting) of Attachment B.

    Vendor is encouraged to propose whatever scenario(s) they deem to be most advantageous to the University. This may include Vendor partnering with another third-party vendor, or engaging another third-party vendor as a subcontractor, as applicable. In any case, be sure to clearly explain the proposed arrangement in your offer.

Execute Addendum:

Vendor Name: _____

Authorized Signature: _____   Date: _____

Name and Title: _____

Email Address: _____