



REQUEST FOR PROPOSAL

***SOFTWARE SOLUTION(S) FOR TICKETING & SALES, MEMBERSHIP,
GIFT MANAGEMENT, DONOR RELATIONSHIP MANAGEMENT, AND
CONSTITUENT COMMUNICATIONS***

**BOK TOWER GARDENS
1151 TOWER BLVD
LAKE WALES, FL 33853**

**APRIL 5, 2024
SUBMISSION REQUIRED: MAY 6, 2024**

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I. Summary & Background

Bok Tower Gardens, Inc, is a nonprofit organization dedicated to sharing the legacy of Edward Bok and his mission to make the world a bit better or more beautiful.

The Gardens offers a robust calendar of concerts, educational programs, and daily opportunities to engage with the natural world. In addition to gardens, BTG features a historic home museum, world class carillon with daily concerts, and nature trails. Programming varies from school field trips, special group tours, and educational classes to the Carillon Classic 5k race, seasonal wine walks, and culinary experiences.

The Gardens seeks proposals for a comprehensive software solution to manage various aspects of our operations, including donor data management and communications, membership management, , and event ticketing and sales.

II. Scope of Work

We require software solution(s) that provide the following functionalities:

Ticketing and Sales

Types

- Admission programs
- Scheduled Events
- Feature/Exhibit Tickets
- Series Tickets

Features

- Tickets with customizable fields including buyer name, event name, location, start date/time (print & digital)
- E-ticket generation & distribution via email/SMS.
- Customizable price types and automatic price adjustment
- Scan to redeem, barcode or QR code
 - Options to redeem once or multiple times

Discounts

- Customizable discount codes (percentage or flat rate)
 - Applied automatically & under special conditions
- Manually adjustable

Sales/POS

- Front-end and back-office POS for events and programs
- Online ticket sales
- Option to print, text, or email receipts
 - Reprint or resend receipts for prior orders
- Cash, credit, will-call, and definable “other” payment methods/channels
- On-site self-service options for customers
- Option to add sales tax as applicable
- Ticket types and reports distinguish between sales method
- Check out includes option to add a gift (round up/flat amount/ %)

- Added gift assigned to a specific solicitation or appeal
- Customizable order confirmations
- Customizable user home screen/dashboard
- Payment processing

Event Management

- Scheduled on-sale period for events and programs
 - Pre-sale periods for specific constituencies, i.e. members
- Customizable questions asked during event registration
- Ticket scanning and/or manual check-in registrants for scheduled events
- Scanned tickets for registered events mark registrant record as “attended”
- Customizable event rosters w/attendee details from constituent records
- Tracking and alerts for allergies or dietary preferences on roster
- Report on event participant demographics, attendance, and other details
- Age verification for age-restricted events
- Track daily admission sales and attendance

Group Sales

- Pre-scheduled groups w/advanced deposits
- Option for exhibit tickets, meals, and other add-ons for groups
- Streamlined group check in
- Alter group itinerary information even after check-in

Desired Integrations

- Smooth integration between organization homepage and online storefront
- Membership card scanning for admission
 - Track times, dates of card scanning
- Members able to receive automatic discounts
- Integrate event calendar with room/event space managers (eSpace)
- Integrate event times and locations with interactive digital map
- Integrate revenue tracking into accounting software (NetSuite)
- Integrate group meal reservations with cafe (Toast)

Membership

Program Management

- Multiple membership program types
 - Cumulative Giving
 - Traditional membership program
 - Monthly membership program
- Adjustable level price points
- Cumulative giving program counts gifts from both the primary and secondary members
- Print membership cards in batches
- Batch entry for mail-in member payments
- Email, text, and mail renewal notices
- Adjustable membership expiration, levels (back of house)
- Print single membership cards on demand
- Custom name formats for membership cards



- Variable data fields for customized member categories
- Data hygiene:
 - Address finder, NCOA
 - Deceased constituent identification
 - Record duplication finder
 - Record merging process
- Assign user roles to restrict portions of database to specific groups
 - Further customize role to allow access to functions outside of specified role
- Allow users to customize home screen with shortcuts to key functions

Benefits

- Member benefit distribution and redemption tracking
- Automatic digital membership card via email/SMS upon purchase
- Ad-hoc digital membership card option
- Push notifications for digital membership card renewals, upgrades, etc.
- Scannable member cards for entry; record scans to member record
- Online login for member discounts
 - Online sign-in uses membership ID
 - Back of house ability to reset passwords

Acquisition and Renewal

- Multiple points-of-sale/multi-channel
 - Online, in-person, back-office
 - On-site self-service option for customers
- Print, email, and text receipts for membership sales
- Apply all of/partial gate admission sales to membership price, by admission type
 - Apply admission when buying a membership online or on-site via self-service
- Member record shows if online account exists
- Online portal for members to update personal information
- Auto renewal w/advanced notification to member
- Member history shows how long a member has been active
- Memberships can be purchased as a gift to another record
 - Communication options to send either to giver, recipient, or both

Desired Integrations

- Integrate revenue tracking into accounting software (NetSuite)
- Integrate with gift shop systems (Celerant & Shopify)

Gift Management

Program Management

- Display soft credited gifts on donor's record
- Store and utilize seasonal addresses for mailings
- Assign and change prospect managers in bulk
- Provide modular constituent record dashboard including:
 - Hard & soft credits
 - Last interactions
 - Spouse/Partner/Child/Additional Adult Name
 - Contact Information

- Prospect manager
 - Recent contact reports
 - Preferences
 - Pronouns
- Data hygiene:
 - Address finder, NCOA
 - Deceased constituent identification
 - Record duplication finder
 - Record merging process
- Assign user roles to restrict portions of database to specific groups
 - Further customize role to allow access to functions outside of specified role
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Gift Processing

- Customizable acknowledgements, based on gift level, program, or first-time giving.
- Categorize records into groups such as Major Donor, Member, Estate Gift Plans
- Manage pledges and recurring gifts
 - Automatically post recurring gifts; send acknowledgements
 - Ability to report on pledges receivable
 - Easily identifiable on constituent records
- Upload/attach gift documentation to gift transactions and constituent records
- Add donations as a sales order or standalone payment
- Matching gift claims and payments
- Soft & hard credits
- Reassign gift credits as needed
- Gifts can be made in Tribute / in Memory
 - Tributes can be assigned in back-office
 - Tributes can be assigned by donor online
- Payment processing
- Auto recurring gifts w/advance notification to donor
 - Auto payment method/CC updates
 - Donor/member can manage recurring payments/update payment method

Grants

- Track grant awards and payments
 - Ability to report on receivables
- Track grant reports/due dates/submittals
- Track grants by type: foundation, corporate, DAF, etc.

Desired Integrations

- Integrate revenue tracking into accounting software (NetSuite)
- Integrate giving history with donor relationship software
- Integrate with point-of-sale to allow front-end donations

Donor Relationship Management

- Track interaction reports/notes
 - Ability to email or share interaction reports with others
- Customizable relationship cultivation plans with defined action steps



- Track gift cycle status (Research, ID, Cultivation, Solicitation, Stewardship)
- Add and edit relationship cultivation plans on multiple records at once
- Email or calendar reminders for planned steps
- Fundraiser dashboard with reminders notifications sent via email or calendar
- Alert or notification when managed prospects visit/gift posts/interaction report logged.
- Robust donor profile detailing important attributes/interests at a glance
- Link parent/subsidiary organizations to records (such as donor advised funds)
- Record of events registered for and attended

Desired Integrations

- Integrate giving history and wealth analytics to determine giving likelihood
- Integrate record's phone and email with Zoom and Microsoft Outlook for quick communication
- Integration with volunteer management to track work hour-based membership benefits (Volgistics)
- Integration with other points-of-sale to track members' food and beverage (Toast)
- Integrate revenue tracking into accounting software (NetSuite)

Constituent Communications

Overall

- Can be scheduled to send on specific days
- Can be sent via email and/or SMS
- Track receipt and click-through of all messages
- Integrate into the relevant systems to track communication history
- Custom communication type (solicitation, cultivation, etc) opt in/out

Ticketing

- Send receipts/order summaries to buyers
- Send eTickets for events to buyers
- Resend documents upon request

Membership

- Send renewal notices at scheduled times relative to member expiration date
- Send links for digital membership cards to members
- Send forewarning of upcoming auto-renewal charges
- Send special promotion messaging to specific member groups

Gift Management

- Send gift acknowledgement/receipt
- Send forewarning of upcoming credit card charges for recurring gifts

Donor Management

- Send solicitation letters through both mail and email
 - Ability to merge data from all fields in record.
 - Customize mailing preferences
- Solicitations generate ask ladders based on recipient's giving history
- Gifts in response to solicitations can be attributed to original mailing



- Customizable URLs for online giving or membership that can be attributed to specific solicitations or appeal codes
- Communication tracker to highlight when records were last contacted or last visited
- Fine-tune solicitations to cater to record preferences
- Create and manage special invite-only events
 - Manage event tasks with email reminders
 - Registrants/Invitees' preferences/restrictions show on event roster

III. Partial Functions with Integration Recommendations

Vendors may propose solutions that cover a portion of the required functionalities with recommendations for integrating third-party products to fulfill the remaining requirements. Proposal should include an outline of functionalities to integrate through a third party with recommended solutions/vendors.

IV. Data Security Practices

Vendors are requested to provide detailed information regarding their data security practices. This should include but not be limited to:

- Encryption methods for sensitive data transmission and storage
- Access control measures to ensure data privacy and confidentiality
- Compliance with industry standards and regulations (e.g., GDPR, PCI DSS, PCI PA-DSS)
- Procedures for data backup, disaster recovery, and breach response
- Security certifications and audits conducted by third-party assessors

V. Proposal Submission Guidelines

Interested vendors are requested to submit their proposals via email to mtyrone@boktower.org no later than May 6, 2024. Proposals should include the following:

- Detailed description of the software solution and its functionalities
- Proposed implementation timeline
- Pricing structure, including any recurring costs or additional fees
- Information on vendor's experience with similar projects
- Statement of data security practices and procedures
- Client references, public gardens preferred
- Any additional features or services offered or proposed to enhance user experience, security, and/or functionality

VI. Evaluation Criteria

Proposals will be evaluated based on the following criteria:

- Suitability of the software solution to meet our organization's requirements
- Pricing and cost-effectiveness
- Vendor's experience and reputation
- Quality of proposed implementation plan
- Effectiveness of data security measures
- References and client testimonials

Upon selection for consideration, product demonstration(s) will be scheduled.

VII. Contact Information

All inquiries regarding this RFP and submission should be directed to Melissa Tyrone, Director of Philanthropy & Membership at mtyrone@boktower.org. **Phone calls will not be accepted.**

Bok Tower Gardens reserves the right to reject any or all proposals received and to negotiate separately with any vendor deemed to be in the best interest of the organization.

We look forward to receiving your proposal.