

February 5, 2018

REQUEST FOR PROPOSALS

FOR

CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM

For the United States Olympic Museum

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## I. INTRODUCTION

### a. Project Description/Responsibilities/Minimum Requirements

The U.S. Olympic Museum in Colorado Springs, CO will become a premier cultural destination, welcoming people from near and far, and of all ages and backgrounds, to come together in the spirit of the Olympic and Paralympic Games.

The 60,000-square-foot building will embody the forward-looking values of Team USA, with 20,000 square feet of highly interactive exhibit space, a state-of-the-art theater, gift shop, and café. The U.S. Olympic Museum will also be the new home of the U.S. Olympic Hall of Fame, a dynamic tribute to inductees—athletes, coaches, leaders and supporters of the U.S. Olympic and Paralympic movement—and their compelling stories.

With construction well underway, stakeholders have raised ~\$75 million to date, and aim to raise an additional \$25 million before the Museum's opening in either 2019 or 2020. Funds raised to date include private contributions, corporate donations, public funds, and grants. Gifts include multi-year pledges and restricted-use contributions. As the Museum gets closer to opening, the fundraising efforts will pick up speed as various campaigns are launched.

Upon opening, the Museum will have various forms of customers: ticketed visitors, school and tour groups, special event guests, prospective donors, existing donors, etc. The Museum will serve an estimated 350,000 ticketed visitors a year. The Museum will also host special events, offer private programming, maintain a membership program, and offer other interfaces with visitors. It is the Museum's goal to capture data on each visitor to maintain their engagement after their visit.

The USOM is requesting quotations for customer relationship management systems. Minimum requirements include:

- Multi-year gift tracking
- Marketing partnership(s) sales pipeline and payment tracking
- Special Event sales and payment pipeline
- Prospective donor tracking
- Mass communications and automated email functionality (i.e. HTML functionality and integration with Museum website)
- Membership tracking
- Marketing partnerships(s) asset and deliverables tracking
- Relationship networking
- Workflow or task assignment
- Robust data reporting



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- Integration with other systems (particularly ticketing, RFID registration, and finance)
- Search functionality
- Letter or document creation
- Export/import abilities

#### **b. Selection process**

The selection process will involve providing a submittal, which will be screened and scored. The USOM will attempt to negotiate an agreement with the highest ranked firm. If unable to successfully negotiate with the top-rated firm or if the process does not yield a satisfactory result, the USOM may withdraw this RFP at its sole discretion. Following is additional information relative to the selection process:

- i. Submittals: Specific requirements for submittals and scoring criteria are detailed in II. SUBMITTAL REQUIREMENTS. To facilitate review, one copy in PDF format of your submittal must be provided. Excluding financial documents, submittals must not be more than 10 pages. Submittals should be sent by e-mail to: [jlawton@usolympicmuseum.org](mailto:jlawton@usolympicmuseum.org)

Deadline for receipt of submittals is outlined in the below schedule in Section I.C. Schedule.

Late submittals will be rejected without consideration. The USOM assumes no responsibility for costs related to the preparation of submittals.

- ii. The submittal screening and oral interview panel will consist of USOM staff members, an outside technology advisor, and may include a USOM Board member.

#### **c. Schedule**

Following is a detailed schedule of events for the RFP process and an outline of the schedule for the balance of the project.

Posting-Advertisement	February 5, 2018
RFP Document available	February 5, 2018



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RFP Submittal due	February 19, 2018
Submittal screening	Week of February 19, 2018
Oral interviews	Week of February 19, 2018
Selection Announced	February 23, 2018
Negotiation of contract	February 23 – February 28, 2018
Contract approved (projected)	March 2, 2018
Anticipated contract start date	March 5, 2018



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## II. SUBMITTAL REQUIREMENTS

Firms will be judged not only on their experience for the type of work involved, but also on their ability to address issues critical to the success of the project requirements outlined in this RFP document. Following are elements that will be used to evaluate each firm's qualifications (Note that the primary focus of the prequalification evaluation will be the firm's capability and the primary focus of the oral interview will be the proposed management team members' capabilities):

### a. Project Team

Identify the project principal, the project manager, key staff and sub-consultants. Present a brief discussion regarding how the team's qualifications and experience relate to the specific project.

### b. Firm capabilities

Provide description of firm's capabilities, including work performed on similar projects, including non-profits.

- Identify functionality specific to fundraising and managing gifts and pledged installments
- Identify functionality specific to managing fundraising and marketing partnership pipelines, including all phases from prospecting to pledged installments and collections
- Identify experience with integration with ticketing and other similar systems
- Specifically provide descriptions of projects of a similar scope as outlined in this RFP and projects of a larger or smaller scope
- Specifically describe other non-profit entities that your firm has worked with
- Describe the firm's security requirements and policies for working with client data

### c. Prior experience

Use this portion of your submittal to describe relevant experiences with the project type described in this RFP document and various services to be provided.

- Please provide references from previous or current clients.
- Please include three (3) years of audited financials or other documentation of the firm's financial viability including ownership subordination to other entities.

### d. Project approach



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For the project and services outlined in the RFP document, describe how your firm plans to accomplish the following project control and management issues:

- Schedule – manage the work to meet the established schedule
- Customization – process for working with the client to determine any customization needs
- Training – proposed structure for training users of your system and the specific amount of time necessary to train to maximize system functionality

#### **e. Cost estimates**

Provide a thorough projection of project costs. Additionally, please outline standard term requirements. Cost estimates should include all costs for data migration, set-up, and ongoing use, including but not limited to:

- User fees
- Implementation costs
- Data migration costs
- Data storage fees
- Training and support cost structure
- Annual fees
- Licensure fees
- Customization fees
- One-time, build-out fees
- Average year over year cost increases
- Website integration fees
- Costs of proposed additional applications
- Other