

CHICAGO ZOOLOGICAL SOCIETY

REQUEST FOR PROPOSAL (RFP) FOR CATERED EVENTS SOFTWARE SOLUTION

The Chicago Zoological Society is soliciting proposals to provide a software solution for the Catered Events department of the Society.

This document outlines the Society's guidelines for your responses. The Proposal must be submitted no later than close of business on October 26, 2018. All questions and responses to the RFP must be addressed to:

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Organizational Overview

The Chicago Zoological Society ("CZS" or "the Society") is a private nonprofit organization that operates Brookfield Zoo on land owned by the Forest Preserves of Cook County. Opened to the public in 1934, Brookfield Zoo has been a Chicago-area treasure and family destination for more than 80 years. Brookfield Zoo is the largest suburban attraction in Cook County, both in size and visitation. The 216-acre Zoo annually serves over two million visitors from the diverse Chicago metropolitan area. The Zoo is open 365 days a year. On an average day, more than 11,000 people visit during the Zoo's peak attendance season in the summer months.

The Society's mission is to inspire conservation leadership by connecting people with wildlife and nature. We strive to provide people of all ages and backgrounds with opportunities to learn about and care for the natural world. When it first opened, Brookfield Zoo was considered "cutting edge" for its bar-less enclosures. One of the first zoos to employ nutritionists, pathologists, veterinarians, geneticists, endocrinologists, and behavioral specialists, we continue in a tradition of innovation.

Project Description

Goals and Objectives

Brookfield Zoo offers guests the opportunity to host corporate and personal events at its unique and exotic venues. Our in-house Catered Events department handles all aspects of organizing the event – reserving your preferred site, selecting a delicious menu from our Executive Chef, providing linens and booking entertainment. The Catering team is looking for a software solution to handle their catering business. In support of this goal, the objectives are as follows:

- 1. Event Planning & Booking**
- 2. Venue Reservation**
- 3. Menu Selection**
- 4. Customer Management**

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5. *Proposal & Contract Generation*
6. *Payment Tracking and Invoice Creation*
7. *Marketing*
8. *Reporting*

Feature Sampling

In 2017, the CZS team conducted a survey to evaluate needed and wish-list features. The list below shows each category with a rough prioritization of requested features. While all listed features would be nice, our final selected solution may miss some points.

Event Planning & Booking

- Event Templates
- BEO generation
 - Easily Created
 - Easy to Read
 - Layout the Maximizes Page Space
- Multiple Fields for Head Count (Contracted, Estimated, Guaranteed, Setup)
- Tracking Changes / Change Log – Maintaining a history
- Online Reservations/Inquiries
- Scheduling Staffing Needs for Events
- Ability to email from program via Outlook Cloud tenant

Venues

- Visibility of Availability
- View Calendars by Day, Week, Month
- Include Restrictions of Certain Venues (Capacity, Alcohol, A/V permissible, etc.)
- Include Turn-Around Times in Booking
- Venue Diagrams/Layouts

Menus & Set Up

- Easy Viewing of Menu Options
- Menu Package Templates (Mains, Sides)
- Equipment Inventory

Customer Management

- Flag/Categorize Events for Future Follow-Up
- Intuitive Searching Tools
- Set Trace Dates for Reminders prior to event date including post event
- History of Prospecting with Customer
- Hierarchy Accounts

Proposal & Contract Generation

- Branded Proposals and Contracts
- Inclusion of Photographs

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Payment Tracking & Invoice Creation

- Detailed, Line Item Invoice

Marketing

- Email Blasts
- Automated Communications

Reporting

- Mailing Lists for Customer Correspondence
- Revenue Breakouts, Market Segment Breakouts, Customer Counts, Client info by Zip Code & Email Addresses
- Activity Reports
- Forecasting Tools
- Prospecting Lists
- Daily Events
- Exporting to Office Applications

RFP Deliverable Components

Each responding bidder should be sure to provide the following details in the proposal.

1. Organization background
 - a. Company history
 - b. Proposed team profiles and roles
 - c. Any history of working with Not for Profits Businesses
2. Outline of Software Solution
 - a. High Level description of the Software Solution
 - b. How it meets above outlined needs
 - c. Additional Functionality of Solution
3. Outline of Services Offered
 - a. What kinds of assistance are/can be provided in order to accomplish a successful deployment
4. Cost estimate(s); please break out the following elements or phases.
 - a. Discovery
 - b. Planning
 - c. Development
 - d. Deployment and
 - e. End-user training
 - f. Ongoing Support

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Timeline

This RFP is being distributed starting the week of **September 17**. Responses are due no later than **October 26**. Partner selection is expected to be completed by **November 16** with a project kick off starting in **January 2019**.

Depending on responses and queries, we may choose to conduct a bidder conference call in **Early November**.

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Required Proposal Response Format

RFP responses should be submitted digitally in PDF form.

Basis for Award of Contract or Purchase Order

The Society will award the contract to the proposal which demonstrates the best combination of price, experience and creativity.

CZS Reservation of Rights

CZS reserves the right to reject any or all proposals, without explanation, to waive irregularities and to accept a proposal which, in CZS' sole judgment, is in the best interest of CZS.

MBE/WBE/DBE/8(a)

The Chicago Zoological Society is committed to ensuring that certified minority-owned business enterprises (MBE), women-owned business enterprises (WBE), disadvantaged business enterprises (DBE), and U.S. Small Business Administration 8(a)-certified (8(a)) firms are afforded opportunities to compete for and participate in the Chicago Zoological Society's purchasing activities. If your company is certified as an MBE, WBE, DBE or 8(a) company, please send your current certification with your response to this RFP.

Vendor References

No less than three (3) partner or client references should be provided.