

Request for Proposal

Project CARAT  
Convention Attendance, Registration, and Asset Tracker

SEPTEMBER 2018



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# Introduction & Background

SenshiCon, Inc, a 501(c)3 nonprofit corporation that organizes annual conventions for fans of anime and pop culture, with an emphasis on magical girls, is in need of a system to track and manage convention attendance and assets, and is accepting proposals in response to this Request for Proposal (this “RFP,” or this “Request for Proposal”) in order to find a qualified source to provide a system to track and manage convention attendance and assets. Our goal with a system to track and manage convention attendance is to:

1. Manage all aspects of badge sales
   1. Sales
   2. Refunds
   3. Attendee contact information
2. Track revenue from sales of convention badges
3. Monitor traffic flow patterns and manage occupancy

The objective of this Request for Proposal is to locate a source that will provide the best overall value to SenshiCon, Inc. While price is a significant factor, other criteria will form the basis of our award decision, as more fully described in the Evaluation Factors section of this Request for Proposal below.

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# Project Description

## The purpose of this project is as follows:

1. Manage all aspects of convention registration
   1. Capture attendee contact information
   2. Sell convention badges
   3. Issue refunds on convention badges
   4. Transfer badges between attendees
2. Control access to convention spaces
   1. Ensure only people with valid badges are in convention spaces
   2. Monitor ingress and egress
   3. Control ingress as needed to prevent overcrowding of convention spaces
3. Manage accountability for loanable SenshiCon assets

## The description of the project is as follows:

The project will be divided into three primary components:

1. Convention Attendance Tracking System (CATS)
   * This is the convention registration component
2. Tracking Heuristic for Attendee Numbers in Occupied Spaces (THANOS)
   * This is the access control component
3. General Equipment Management System (GEMS)
   * This component tracks convention assets and facilitates loaning of assets in a manner similar to a library

The key words "MUST", "MUST NOT", "REQUIRED", "SHALL", "SHALL NOT", "SHOULD", "SHOULD NOT", "RECOMMENDED", "MAY", and "OPTIONAL" in this document, regardless of capitalisation, are to be interpreted as described in RFC 2119 from the Internet Engineering Task Force.

### ***CATS - Convention Attendee Tracking System***

SenshiCon has in the past used Convention Master from Civet Solutions and Cons.mx from UpcomingCons.com and has found both systems to be inadequate. Cons.mx is cumbersome and lacks fundamental features such as the ability to process refunds; it also requires the use of an insecure and outdated browser plug-in and only works with one specific type of label printer. Neither solution is able to create badges with barcodes or other machine-readable tags. The ability to edit attendee data is cumbersome with both systems, and neither is capable of interfacing with other systems SenshiCon wishes to implement (e.g. THANOS and GEMS). SenshiCon is currently exploring using services provided by Eventbrite, however we have needs beyond what Eventbrite is able to provide. The ability to continue using Eventbrite and minimize further changes to the user experience would be ideal.

SenshiCon has determined that the following functionality is required unless otherwise indicated:

1. Users should be able to:
   * Create accounts for themselves
   * Edit their own contact and demographic data
     + At minimum, a name and e-mail address will be required
   * Edit the names of members of their family/party so that one account may purchase badges for the entire group
     + Optional: Allow linking to other accounts so that one person may purchase a badge on behalf of another who holds their own account
   * Recover their accounts in case of forgotten username and/or password
   * Register for upcoming events and pay registration fees electronically
2. SenshiCon staff members with the appropriate access level must be able to:
   * Set up registration types (e.g. Standard, Premium, or Exhibitor)
     + The prices for each type of badge shall be independent of each other
     + A staff member with the ability to set registration prices shall be able to set price changes to take effect either immediately or at a scheduled time
   * Set up optional access codes or promotional codes to limit the ability to purchase specific badge types and/or specific price points.
   * Select a validity period for access codes
     + Indefinitely, or
     + A specific time period, and/or
     + A specific number of uses
       - One “use” will be defined as a single transaction, regardless of the number of registrations within that transaction
       - The number of uses should be resettable in the event of refunds
       - The decision to adjust the number of remaining uses in the event of a refund shall be at the discretion of the staff member issuing the refund

### THANOS - Tracking Heuristic for Attendee Numbers in Occupied Spaces

Having attended other conventions such as Anime Expo and observing sometimes severe cases of overcrowding, SenshiCon wishes to take a proactive approach to controlling occupancy. The system shall monitor and display the number of people within areas for which SenshiCon has responsibility with the exception of people employed or contracted by the venue itself.

* Each entrance and exit to the venue and monitored spaces within the venue shall have badge scanners (e.g. at the convention center entrances/exits and the entrances/exits to Hall H)
  + Badge numbers must not be entered manually at entry points
  + There shall be status indicators associated with each badge reader. These indicators will have four states:
    - Blue: The reader is ready for scans
    - Red: There was an error reading the badge or there is an account-related issue
    - Yellow: The badge was read successfully but the venue is at capacity
    - Green: The badge was read successfully and the person may enter
  + The system must give authorized users the ability to mark specific badges or badge types as exempt from capacity limits (and therefore never getting a yellow light)
* There shall be a master situation display with the venue floor plan and all figures tracked by the system

### GEMS - General Equipment Management System

This system will maintain accountability for physical assets belonging to, rented by, or borrowed by SenshiCon. The system will track item ownership (i.e. whether the asset is owned by SenshiCon or some other entity doing business with SenshiCon) and custody (i.e. what person or department currently has responsibility for and/or possession of an asset). The system will be similar in function to those used by libraries. The system will not be self-serve.

SenshiCon requires a number of features not commonly found with such systems:

* The system must allow for asset responsibility to be directly transferred from one borrower to another without an intervening check-in
* Borrowers that have assets on their accounts will be denied entry by THANOS until all assets are returned

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# Project Scope

The scope of the project entails all design, development, coding, licensing, and hosting of back-end systems. All text and copy specific to SenshiCon (e.g. text other than generic terms such as "Name" or "Address") will be provided by SenshiCon.

The successful bidder will be responsible for providing support for software installation on hardware currently owned by SenshiCon as well as hardware later acquired during the contracted term. The successful bidder will also be responsible for making necessary modifications to the system to facilitate using any new printers acquired during the contracted term. It is understood that any future hardware that is to be part of the system will meet mutually agreed upon standards.

## The criteria set forth below should be met to achieve successful completion of the project:

1. Implementation of all required functionality described in the Project Description
2. Visually and aesthetically pleasing design complying with Web Content Accessibility Guidelines (WCAG) as applicable
3. Consistency of design across:
   1. Pages
   2. Operating environments
      1. Self-service kiosks
      2. Staffed registration stations
      3. At-home web-based registration
   3. Hardware platforms
      1. Mobile devices (tablets and phones)
      2. Personal computers (desktop or laptop computers)
4. Ability to be enhanced in the future as requirements change
5. Plan and perform a complete testing process on the system to ensure system stability and robustness
6. All software and licensing requirements should be included as part of the project

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# Budget

SenshiCon’s budget for the project is $9000.01.

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# Evaluation Factors

SenshiCon will rate proposals based on the following factors, with cost being the most important factor:

1. Responsiveness to the requirements set forth in this Request for Proposal
2. Relevant past performance/experience
3. Samples of work
4. Cost, including an assessment of total cost of ownership.
5. Technical expertise/experience of bidder and bidder’s staff

SenshiCon reserves the right to award to the bidder that presents the best value to SenshiCon as determined solely by SenshiCon in its absolute discretion.