Request for Proposal (RFP) Recreation Registration Software

June 14, 2017
Proposal Submission Deadline: July 14, 2017 at 2:00 pm CDT

Introduction and Scope of Project

The River Trails Park District (Hereinafter, "RTPD"), located in Mount Prospect / Prospect Heights Illinois, is seeking proposals from qualified proponents to provide, install, and train park district staff in the day-to-day operation of a Recreation Registration Software System. Such system must meet certain minimum performance requirements contained in this Request for Proposal (RFP).

RTPD is a community with a population of approximately 17,000. RTPD has 16 full-time employees in addition to part-time and seasonal positions. RTPD is home to a number of recreation areas, which include:

> Marvin Weiss Community Center
> Burning Bush Community Center
> The Zone Recreation Center
> Woodland Trails Pool
> Rob Roy Golf Course
> Woodland Trails Driving Range
> Woodland Trails Miniature Golf
> Parks (8) & Playgrounds (9)
> Outdoor Shelters (7)
> Skate Park
> Roller Hockey Court
> Tennis Courts (12)
> Baseball / Softball (6) and Soccer (8) Fields
> Outdoor Volleyball (4), Futsal (3), and Basketball (8) Courts

RTPD's Board of Commissioners has allocated funds in the 2017 budget to contract with a new Recreation Registration software product. RTPD has utilized Active Network's CLASS software as the primary solution for supporting core parks and recreation business processes.

Staff members have cataloged our requirements as well as features that would be desirable. However, we are also approaching this project with open minds to new innovations, and are interested in partnering with a vendor who offers proven expertise.

General Background Info

Presently RTPD uses Active Network's CLASS Recreation Registration software to run our operations, including activity registrations and facility scheduling. The current CLASS software is expected to reach end of life in November 2017 and will no longer be supported by Active Network. RTPD recognizes this as an opportunity to find software which will have expanded functionality to better support business processes, to find opportunities for process improvement, to better support staff in the delivery of parks and recreation management, to take advantage of best practices, and to

significantly improve the efficiency and effectiveness of the Park District's customer service experience.

The proposed software must be able to integrate with River Trails Park District's financial management software. Presently, RTPD currently uses Harris Local Government's MSI product for Financial Management. The vendor should include with their proposal any minimum computer requirements for software to work appropriately with this product. Additionally, the software must interface with our website effectively.

Project Timetable
The projected timetable for this project, which encompasses the conversion of data from the present software system to the new Recreation Registration Software system is as follows:

June 14, 2017	Distribute RFP to identified potential proponents
July 14, 2017	Proponent proposals due by 2:00 pm CDT on this date
August 2017	Software demonstrations to be scheduled
September 2017	Board approval of recommended Recreation Software
October 2017	Implementation, data conversion and training process begins
February 15, 2018	New software system to be fully operational
March 2018	Anticipated "Go live" date for Recreation Staff
May 2018	Anticipated "Go live" date for Community (Fall Kid Squad sign up)
August 2018	Anticipated "Go live" date for Community (all Fall 2018 Programs)

Software Objectives
The River Trails Park District is interested in recreation registration software that will create efficiencies, conveniences, and accessibility to accurate real-time information for both Park District employees and patrons. RTPD strives to provide the highest levels of service to patrons. Users who prefer online interaction should be able to sign up for recreation programs, special events, leagues, parties and facility rentals with us easily, and have access to all programs with minimal inconvenience. When we cannot provide personal service in person or on the phone, we want patrons to have easy access to information in a searchable, easy-to-navigate format on a variety of devices. The software will further enhance and innovate the district's quality customer service by taking advantage of the conveniences offered by newer improved technology.

Requirements – Functional (Our "Needs")
The following are considered baseline requirements:
- User friendly registration system for both front desk staff members and directly by patrons through an online interface accessible on a variety of devices.

- The ability to export data from the software system for the purpose of producing printed and web-based program brochures, preferably to the format of the park district's branding guidelines.

- Point-of-sale system that provides for internal cash controls and allows for payment intake at multiple locations.

- Searching – allow visitors to perform a search in order to find specific information, and provide flexibility in narrowing down search results. This would include using criteria such as location, category, participant age, time, and or keyword. Additionally, the software would provide

current, up-to-date listings of availability for programs, facilities, rental spaces, and open party times.

- Responsive Design – Smart phone / tablet style capabilities for viewing and registration on a variety of devices as well as compatibility with various internet browsers including Microsoft Internet Explorer, Google Chrome, Apple Safari, and Firefox.
- Training – User training for a minimum of ten (10) employees. Administrator training for three (3) individuals as needed.
- A seamless transition from the current software to the new software. RTPD may elect to take responsibility for data entry tasks to reduce costs.

Requirements – Technical (Technical "Needs")

The selected software must meet the following criteria:

- Content Management System – preference will be given to a mature, proven, well-known CMS that supports multiple secure user accounts that enable specific view/report/add/edit permissions.
- Software should be reliable, secure and robust, in accordance with industry standards and practices. The software may be either locally-housed, or a cloud-based "software as a service" platform.
- Software will contain an accurate and complete audit trail that ensures efficient processing.
- Software will need to interface with Harris Local Government's MSI product for Financial Management Software. Critical functionality includes a general ledger data export.
- Software will process credit card payments in a timely manner so that funds are received promptly into the district's bank account. Credit card payments (both online and point-of-sale) must meet industry standards for data security.
- Software shall include the ability to implement different security levels.
- Launch Date – Targeted for March 1, 2018

Specific Requested Features (Our "Wants")

Following are some features that staff would like to see included in the software, or in some cases specific requests or suggestions from patrons:

- Ability to export information into a format so that the data can be utilized within Microsoft Excel.
- Flexible searching capacity for staff within the customer database and other fields for reporting key customer information.
- Ability to run customizable reports based off of target demographics; such as age, grade, previous program registration, resident, non-resident and other software fields.
- The ability to communicate with patrons including emailing and/or texting receipts, registration confirmations, promotions, special events and membership information. There is also potential interest in sending surveys and newsletters.
- An online feature for indoor and outdoor facility reservations (such as athletic fields and activity rooms) that includes the ability to view and/or reserve facilities online, preferably in a calendar-based format.
- Ability for patrons to print waivers, parent manuals, facility use permits, and other forms with the option for online signature for acknowledgements, waivers, and other forms.

- Ability to schedule and process automatic monthly electronic fund transfer transactions from participants for programs such as fitness club membership registrations and renewals.
- Ability to allow customers to set up payment plans for some programs which involve an initial payment and future balance payments on set due dates, either in-person or automatically by ACH or credit/debit card.
- Ability for participants to print documentation of payment for programs that qualify for flexible spending account (FSA) tax credits which would include the park district's FEIN number.
- Ability for patron users to reset passwords via the software interface and email.
- Ability to integrate hyperlinks within the software to the district's Geographic Information System (GIS) and RTPD website for photos and other information.
- Ability for attendance tracking of programs, with possible functionality for secure sign-in/sign-out of children from programs such as summer camp and early childhood pre-school.

Other Requested Features
- Prospective company is to ensure the staff assigned to this account will be maintained over the term of the agreement. Any changes in the assigned personnel are at the discretion of the firm, provided any replacements have the same or better qualifications than the original point person. The RTPD is to be notified in writing of any personnel changes.
- The contractor will be required to meet regularly with the RTPD employees and/or other representatives to discuss the transition project and provide progress reports.

Proposal Requirements
In addition to highlighting the capabilities of the proposed recreation registration software solution to satisfy the requirements and requested features listed in the above section, the following elements should be addressed in the RFP response:
- Company overview and qualifications – Provide a brief company history along with an overview of outlining key competencies and approach. Detail Proposer's overall experience demonstrating ability to successfully complete the Scope of Project. The Proposer shall present evidence the firm or its officers have been engaged for at least the past three years in providing services as listed in this RFP.

- Qualifications of staff assigned to the project with a well-defined scope of services available including any required or optional ongoing maintenance services. Identify the staff providing the required services including years and type of experience for each person. The party in charge of the RTPD project and account must have at least five years prior software implementation experience.

- Proposer should demonstrate viability as a company and a commitment to customers through regular product enhancements and ongoing support.

- Three references from clients utilizing the proposer's recreation registration software, preferably similar in scope and nature to RTPD. References must include name, position, telephone number, e-mail and internet address of the contact person for each listed account.

- Provide a list of Park Districts who have undertaken a new recreation registration software implementation with the proposer in the last two years (preferably in Illinois).

- Submit a detailed cost proposal to include all aspects of fees associated with software, hardware, project management, implementation, training and any other pertinent expenses for the initial year. Detail timeline, including milestones and payment schedule.

- Submit a detailed cost proposal listing recurring expenses for maintenance, additional customization, future upgrades, and all other optional services offered.

- Provide a detail of any necessary hardware requirements, or third-party software packages required and potential licensing costs.

- Provide a listing of any credit card processing fees associated with the recreation software.

- Provide evidence of firm's financial stability.

- Propose process for working with the RTPD to transition from the current CLASS registration software to the new software and associated timeline for completing the work. Detail how the company will, with input from the RTPD team, create/import the course listings, facility lists, general ledger accounts, employee user groups, and other client information.

- Outline the plan to transfer current data within the CLASS software to the new software and preferred method of collecting information.

- Describe how the company will manage the beta testing for the recreation registration software both onsite at the employee desktops and on the RTPD website prior to going live for client use, and the communications to park district clients regarding their use of the new software.

- Detail the training and support of the RTPD staff.

- Describe any other relevant information.

Selection Criteria

The River Trails Park District's award of a contract will be based on multiple selection criteria, as follows:

- Functionality and flexibility of the software system to meet the Park District's needs.
- Quality and experience of the proponent's company, implementation project team, service and support.
- Reputation of the Proponent in serving other park district and municipal clients similar to RTPD for recreation and facilities.
- Commitment to ongoing maintenance and improvement of the proposed system.
- Compatibility with the Park District's existing computer systems and programs.
- Pricing of software and service including total costs projected over the proposed initial contract year and ongoing costs in subsequent years.

This contract for software and related services is considered to be a contract for professional services. The cost of the proposed system, while a major consideration, will be one of several criteria in the selection of the system which best meets RTPD's needs.

Logistics

Point of contact for all questions related to this RFP is Steve Cummins, and all inquiries related to this RFP should be directed to scummins@RTPD.org or (847) 463-3729.

Proposals to include, at a minimum:

- A time line for the project including milestones and payment schedule.
- Clear breakdown of costs for initial specified work, recurring expenses for maintenance, and hourly rate for additional customization and future expansion.
- Examples of clients utilizing the software, with contact information for references.

Following review by RTPD staff, a "short list" of candidates may be selected from the proposals received, and scheduled for an interview and presentation.

The River Trails Park District retains the right to withdraw or amend this RFP at any time prior to execution of a contract, and to accept any proposal it determines in its sole discretion to be in the best interest of the RTPD.

The proposer is not relieved from errors in Proposal preparation.

The River Trails Park District is a tax exempt organization.

Email or mail the proposal to Steve Cummins, Superintendent of Finance at:
River Trails Park District
401 E. Camp McDonald Road
Prospect Heights, IL 60070
scummins@rtpd.org
401admin@rtpd.org

RECREATION REGISTRATION SOFTWARE & SUPPORT

PROPOSAL FORM

River Trails Park District
401 E. Camp McDonald Rd
Prospect Heights, IL 60070
(847) 788-0551

<u>DATE</u>
June 14, 2017

<u>DUE DATE</u>
July 14, 2017

<u>IMPLEMENTATION & TRAINING</u>
October 2017 – March 2018

Proposals will be received by the River Trails Park District until 2:00 pm CST on July 14, 2017 for furnishing the following services to be delivered in accordance with the following instructions:

Delivery to: Steve Cummins
                            River Trails Park District
                            401 E. Camp McDonald Rd
                            Prospect Heights, IL 60070

PROPOSAL FORM

The undersigned Proposal agrees that should this bid be accepted by the Owner, the undersigned will be bound to the River Trails Park District Board of Park Commissioners to perform all work necessary to complete Project in accordance with the written Specifications for the amounts set forth as follows:

Base Package for Registration Software $_____

Hardware Devices (if applicable) $_____

Project Management $_____

Implementation / Startup $_____

Customizations $_____

Training $_____

Annual Maintenance & Support - Software $_____

Annual Maintenance & Support - Hardware $_____

Miscellaneous Cost (if applicable - must specify) $_____

Grand Total $_____

_____
Company name of the Proposal (Print)

_____
Full name of person submitting Proposal (print)

_____
Official Title

_____
Street Address

_____
City   State   Zip

_____
Telephone

_____
Email

_____   _____
Authorized Signature   **Date**

If some of these have no real additional costs and would be part of the base package, please note as such:

Item	Description	Initial Setup	Annual Cost
Base Package for Registration Software			
Hardware Devices (if applicable)			
Project Management Costs	Full project management for all components of the registration software.		
Implementation / Startup Costs	Implementation and technical installation of the registration software, including installation and integration services if applicable.		
	Costs associated with extracting and saving customer account information and any historic data as recommended by the vendor.		
Customizations	Costs for any custom programs created specifically for RTPD needs/wants that are not a part of the current software functionality. (itemize individually)		
Training	Training for RTPD Staff. Please indicate the total hours of initial training time anticipated, duration of classes and any costs not a part of the base package.		
Annual Maintenance & Support (Software)	Yearly Fee (including HD Space, bandwidth usage costs if applicable)		
Annual Maintenance & Support (Hardware)	Functionality Updates (included or recurring additional?)		
Miscellaneous Cost(s)	Credit card processing fees, others		